



# **Lincoln Christ's Hospital School**

## **Travel and Expenses Policy**

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## **Introduction**

This policy sets out the circumstances in which an academy employee or worker may be able to claim allowances with regard to reimbursement of costs for travel /expenses incurred in the course of their employment.

Adherence to this policy will ensure that employees are reimbursed fairly for legitimate business expenses/travel and that such reimbursement is treated appropriately for tax purposes.

## **Purpose and Scope**

This policy covers all LCHS contracted employees, including all contracted teaching and support staff.

The policy sets out the limits of what employees are able to claim and also advises how such claims should be made and submitted.

The policy should also act as a reference for budget holders in determining the validity of such claims as may be submitted.

## **Travel**

Employees should only undertake business journeys when they are absolutely necessary. Other options which are more efficient and cost effective (for example: email, telephone, video or conference call) should always be given full consideration before travel is undertaken.

Where a business journey is deemed necessary, employees are expected to organise this using the most direct and effective route.

The academy will support necessary business travel and travel with regard to professional development/training, including reimbursement of costs arising from the use of the employees own vehicle and the provision of other support.

Use of environmentally travel is always encouraged by the academy.

## **Mileage Payments**

Employees who use their own car, van, motorcycle or cycle for official work purposes are entitled to be reimbursed in accordance with the approved mileage rates. Please see appendix 1.

The basic principle for claiming mileage is that it should be calculated from the employee's workplace and back again. Normal everyday home to workplace mileage is the responsibility of the employee and no mileage payment will be applicable.

Where a number of employees undertake the same or a similar journey for official school purposes, they should always travel together (unless there is a clear justification for not doing so)

In addition to mileage rates, employees who take passengers in a car or van may claim a passenger mileage payment per passenger per mile, where such payment is likely to involve the academy trust in less expense than would have been incurred by paying full travel expenses of the passengers.

To claim a passenger mileage payment any passenger must also be an employee of the academy and must be travelling on the same school business. Where the passenger does not start or finish their journey at the same time as the driver, then the driver can only claim for the number of miles that the passenger was actually present in the vehicle.

Where it is more beneficial for employees to travel direct from home to an outside appointment or vice versa, rather than call in to the workplace first, they are only entitled to claim the number of miles over and above their normal home to work mileage. On this basis, all travel/mileage claims in any one day should always exclude the employee's normal home to office miles regardless of the reason e.g. training course.

### **Parking expenses**

Car parking charges incurred on school business may be reclaimed in full. All car parking receipts must be retained and submitted to the claim form.

No reimbursement will be made for parking charges at the employee's normal place of work. The only exception relates to employees with a declared disability affecting mobility. In this situation, reasonable charges for car parking at, or as near as possible to their usual place of work will be reimbursed where there are no free parking facilities.

The school/academy will not reimburse employees in respect of parking (or similar) fines; these are the direct responsibility of the employee.

### **Insurance**

Employees who use their own vehicle for work purposes should ensure that they have the appropriate insurance to cover business travel. This is normally referred to as 'business, social and domestic cover. It is the employee's responsibility to ensure they have the appropriate insurance cover and the school is not responsible for paying any additional

premium for business cover, unless agreed by the Headteacher and the Principle Finance Officer.

### **Bus or Rail travel**

Bus or rail fares for authorised business journeys will be reimbursed in full on production of an appropriate receipt or record of travel; this is to be submitted with the monthly mileage claim submitted to the HR Manager/Payroll.

If an employee requires a rail ticket for business purposes they must contact their department budget holder and the Principal Finance Officer who can organise this for them.

With regards to rail travel, all employees are expected to travel standard class and to take advantage of off peak or other reduced rates if the circumstances allow. Any supplementary charge for first class travel will not be reimbursed.

If employees choose to undertake journeys by car when it would be practical and/or cheaper to travel by train, then the employee's claim should be limited to the equivalent of the train fare.

### **Authorisation of business journeys/mileage.**

The formal responsibility of authorising business journeys/training rests with the department budget holder and the Head of Professional Development. Employees have to seek approval in advance regarding any business journeys/professional development.

### **Accommodation**

All overnight stays must be approved in advance by the authorised department budget holder or the Head of Professional Development and the Principal Finance Officer.

In some situations, particular certain training courses accommodation is provided as part of the package, in which case employees do not need to make any claim.

The Budget Holder/Principal Finance Officer will determine in advance the level of funding allocated for the accommodation. All accommodation booked will be in relation to the business/training event and will represent value for money and convenience for the employee.

### **Other Expenses**

If employee's are required to travel abroad for the purpose of a school trip or on other business necessarily related to the school, a separate allowance in respect of incidental out of pocket expenses may be claimed. This should be discussed with the department budget holder and the Principal Finance Officer in advance (if possible). All receipts must be retained for this purpose and the employee will be reimbursed as agreed.

## **Methods of claiming**

Employees should complete a timesheet to claim back for any business travel mileage and expenses. This will need to be signed off from your line manager and forwarded to the HR Manager before the 1st<sup>h</sup> of the following month from which you are claiming for. This will be checked and further approved and forwarded to the schools payroll team for payment. Employees will be reimbursed via the monthly payroll received on the 23<sup>rd</sup> of each month.

All VAT receipts should be attached to the claims. The HR manager will keep a copy of the receipts claim but it is also the responsibility of the employee to maintain a copy of the claim for their own records.

Should any employee delay in submitting a claim form they must anticipate a delay in processing and payment.

The timesheets are found in the following location:

T/staff hour sheets/school timesheets V05.

The tabs are split by teaching and support staff.

The mileage/travel section is halfway down the sheet. Please enter the date/passenger travel details (location and nature of business), the amount of miles entered in the non-taxable miles field and the number of passenger miles. Please complete the registration, cc, make/model of the vehicle used.

Please complete the section for any other expenses from the drop down menu. Any receipts should be attached to the claim when printed off.

Please sign and date the claim form and submit to your line manager for approval/authorisation and subsequently forwarded to the school HR Manager.

## **APPENDIX 1**

### **EMPLOYEE BUSINESS TRAVEL RATES**

The following rates apply to LCHS employees who are required to travel on school business from the 1 September 2015.

	<b><u>PENCE PER MILE</u></b>
CAR OR VAN USERS	45 PENCE
CAR OR VAN USERS (PROFESSIONAL DEV)	35 PENCE
MOTORCYCLE USERS	25 PENCE
BICYCLE USERS	20 PENCE
PASSENGERS	5 PENCE

ALL THE ABOVE REIMBURSEMENTS AND ALLOWANCES ARE TO BE PAID FREE OF TAX