

Travel and Subsistence Expenses Policy

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Equality, Diversity And Human Right Statement	The Trust is committed to an environment that promotes equality and embraces diversity in its performance both as a service provider and employer. It will adhere to legal and performance requirements and will mainstream Equality, Diversity and Human Rights principles through its policies, procedures, service development and engagement processes. This procedure should be implemented with due regard to this commitment.		
To be read in conjunction with / Associated Documents:	<ul style="list-style-type: none"> NHS Terms and Conditions of Service NHS Appointments Commission/Non-Executive Board Members Medical and Dental Terms and Conditions 	Information Classification Label	<input type="checkbox"/> Unclassified
Access to Information	To access this document in another language or format please contact the policy author.		

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Version number	Page	Changes made with rationale and impact on practice	Date

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1. Policy on a page

The purpose of this policy is to provide a clear understanding of the Trust's principles relating to business travel and expenses and to set out the rules and guidance to be followed for claiming, authorisation and reimbursement. It sets out the financial limits that the Trust will reimburse time limits on claims, booking process and claims/reimbursement process.

As a public body the Trust has a duty to manage its resources efficiently and effectively and the objective of this policy is to ensure that expenditure reimbursed is appropriate, cost effective, promotes the reduction of carbon emissions where possible and fulfils the needs of both the Trust and the employee. The general principle is to reimburse reasonable expenses but in doing so there is a need to ensure that the cost of expenses is kept to a minimum and to achieve that the Trust will only reimburse on the basis of the least expensive practicable option at the time of booking regardless of the actual expense incurred by the individual where they exercised personal choice.

These provisions apply to all staff employed by and/or seconded to Liverpool University Hospital NHS Foundation Trust, including Non-Executive Board members. It applies equally to all claimants regardless of their position or status in the Trust.

2. Purpose

The Liverpool University Hospital NHS Foundation Trust (the Trust) has a commitment to the environment. The Trust has a Green Transport Strategy and a Carbon Strategy Plan – this policy is closely linked with both of these. Where it is necessary for staff to make a journey, every effort must be made to both minimise the environmental impact and cost of that journey. It is recognised that in most instances it is more environmentally friendly to travel by public transport and this is encouraged.

This Policy sets out the circumstances in which the Trust will reimburse staff for reasonable travel, telephone, hotel, subsistence and associated expenses incurred whilst undertaking official business on the Trust's behalf. The policy also details the expenses which may be claimed by medical, dental, and other staff whilst they are on study and professional leave.

This policy replaces all pre-existing, local arrangements for the reimbursement of expenses and follows the principles and requirements of the NHS Terms and Conditions of Service, the Terms and Conditions of Service for Medical and Dental Staff and the conditions for Non-Executive Directors.

3. Definitions

3.1 Expenses

For the purpose of this policy, expenses are defined as those incurred for travel and subsistence whilst conducting Trust business or on approved study/professional leave.

3.1 Claimant

The Claimant is the employee who has incurred the expense and is claiming reimbursement for it.

3.2 Approver

The Approver is the manager who is authorising payment of an employee's expense claim.

3.3 Reserve Rate

The 'Reserve Rate' is a particular rate of reimbursement, as part of national Terms and Conditions (Section 17.7), that applies to employees using their own vehicles for business purposes in the following situations:

- When an employee declines the offer to lease a vehicle
- When an employee is required to return to work or work overtime (over and above their normal journey from work)
- A claim for excess mileage is made where there is a compulsory change of base
- When an employee uses their own vehicle when suitable public transport is available and appropriate in the circumstances.

3.4 Official Mileage

Payment for mileage claims paid for the shortest official mileage between each location visited.

3.5 Passenger Mileage Rate

This category is payment to staff who convey other members of staff on official business.

3.6 Transporting Equipment

Where at the requirement of the trust, an employee carries heavy or bulky equipment in a private car; an allowance shall be paid for journeys on which the equipment is carried. In the event of an accident or theft whilst transporting Trust Equipment, all liability will be covered under the Trust Insurance Policy.

3.7 Subsistence Allowances

The reimbursement of necessary extra costs of undertaking official duties away from home.

3.8 Agreed Work Base

This is the hospital/base where the employees undertake their principal duties.

4. Policy Content

4.1 Administration

Wherever possible (unless cheaper rates can be clearly identified), all train tickets and hotel bookings should be arranged through the Trust's Travel Agent via the Expenses Team. Arrangements should be made as far in advance as possible, as this may enable access to discounted fares etc. The use of the Agent removes the need for staff to have to pay for themselves and then claim this back, although where arrangements are made at short notice, it may be more cost effective for staff to purchase tickets for themselves.

The process and requirements for claiming expenses is set out in Appendix 2. All approved payments will be subject to taxation in accordance with the HMRC regulations as detailed on <http://www.hmrc.gov.uk/>

Claims for expenses should be submitted immediately or within a month of the expenditure occurred. Where this is not possible, the claim should be submitted no later than 3 months after the event. Any claims made after the 3-month cut off will not be paid.

The trust recognises that there could be unforeseen circumstances such as sickness that could prevent a submission of a claim within the stated timescales. In such cases, the Expenses Team will liaise with the relevant Divisional Manager to investigate and where deemed appropriate will authorise payment of the late claim.

4.2 Travel Expenses

Travel allowances reimburse employees for the cost of necessary business travel. The conditions relating to such expenses are set out in Appendix 3.

The rates of entitlement are as set out in the NHS Terms and Conditions of Service handbook, the Medical and Dental Terms and Conditions of Service Handbook and the Trust Development Authority Non-Executive Expenses Agreement as appropriate.

4.3 Mileage Allowances

The rates of entitlement are as set out in the NHS Terms and Conditions of Service handbook, the Medical and Dental Terms and Conditions of Service Handbook and the Trust Development Authority Non-Executive Expenses Agreement as appropriate.

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The rates are set to allow coverage of fuel costs, business insurance and appropriate wear and tear in relation to the business miles undertaken. The rates are not for profit or income.

The expenses system is set to utilise the shortest mileage route and will not accept detour miles.

The Trust will not reimburse parking fines, congestions charges fines or fines for any other motor related offences.

Employees and managers driving for work in their own vehicle must ensure that prior to commencing a journey that the following is adhered to

- The vehicle complies with the law, is in a safe and roadworthy conditions and suitable for its purpose
- They hold a valid driving licence
- They have a minimum of third-party insurance (including business cover, cover against risk or injury to, or death of official passengers and damage to property) and that this insurance cover is maintained throughout the entire period of the claim.

All vehicle documents must be uploaded on to the Trust Online Expenses for review, no travel should be authorised until the vehicle and licence checks have been completed.

4.4 Public Transport

Mileage rates will not apply if an employee uses a private motor vehicle in circumstances where travel by public transport would be appropriate. For such journeys the Reserve Rate (see section 2.5) will be applied.

When using public transport, staff are expected to take advantage of any cheap fares available, and reimbursement will be based on standard/economy fares unless other fares are cheaper. This will necessitate booking the journey as far in advance as possible, purchasing “advance” or “off peak” tickets rather than “anytime” tickets, and using the Trust’s Travel agent. If a ticket is booked directly the Trust will only reimburse the level at which the ticket could have been obtained via the service provider. Justification of the claim requires a printout of the options available from the chosen website showing all options at the time of booking. Exceptions to this must be justified by a senior manager.

Staff are expected to use standard class travel unless a cheaper deal for first class can be secured. All rail tickets should be booked through Click Travel It is accepted that flying may be appropriate, but this must be negotiated at the time of application for travel. There is a limit on the amount that can be claimed for any travel - £275 return. For medical & dental Study leave please refer to the Trust policy for limits that apply.

Specific provisions for subsistence apply in relation to study leave as set out in the relevant policies / processes. The overnight accommodation rate for medical staff is limited to £75 maximum per night accommodation and subsistence rate is £20 per 24 hours. (Trainee medical staff get maximum travel allowance of £240 or mileage allowance at 23p per mile).

The conditions relating to the use of Public Transport are set out in Appendix 5.

4.4 Accommodation and Subsistence

The purpose of this section is to advise on the reimbursement to be made to staff for the necessary extra costs of meals, accommodation and travel arising as a result of official duties away from home.

Staff are expected to take advantage of standard and reasonably priced accommodation and reimbursement will be based on the maximum limit as set out in the NHS Terms and Conditions of Service handbook, the Medical and Dental Terms and Conditions of Service Handbook and the Trust Development Authority Non-Executive Expenses Agreement as appropriate.

Accommodation should be booked through the Trust's travel agent via Click Travel. If a ticket is booked directly, the Trust will only reimburse the level at which the accommodation could have been obtained via the service provider / Expenses team. Justification of the claim requires a printout of the options available from the chosen website showing all options at the time of booking. Exceptions to this must be justified by a senior manager.

Business expenses that may arise, such as the cost of necessary official telephone calls may be reimbursed with proof of expenditure.

5. Exceptions

There are no exceptions.

5.1 Responsibilities of Employee's

- Employees are expected to adhere to the correct procedure for claiming expenses that is set out in appendix 1.
- Employees are expected to adhere to the correct procedure for arranging travel. This can be booked via the Expenses team but must be done in sufficient time so as to secure the best deal.
- All employees are required to submit all expense claims using the Trust's online expenses system.
- To register on the expense system employees will be required to complete and submit an Expense Registration Form.

- Employees must provide all the appropriate receipts and tickets, which must be scanned and uploaded into the online expenses system. The original receipts must be retained by the individual making the claim and must be made available for audit by HMRC on request.
- Employees must ensure that any claims they make are accurate, submitted immediately or within a month of the expenditure occurred. Where this is not possible the claim should be submitted no later than 3 months after the event.
- Employees must also ensure that their vehicle is kept in a roadworthy condition and complies with all the appropriate requirements regarding road tax, insurance, and MOT certificates. For employees with lease vehicles through e.g. salary sacrifice, then details of road tax, insurance and MOT certificates must still be entered but can be verified by the Expenses team.
- Employees must also inform their manager of any changes regarding these documents, and any driving offences which may lead to loss of licence whilst in the Trust's employment.

5.2 Responsibilities of Managers

- Managers are responsible for identifying those members of their staff whose role requires them, during the course of their work, to travel and claim reimbursement for travel and associated expenses, and for informing those employees of their responsibilities under this policy.
- Managers must ensure their staff only submit expense claims using the Trust's online expenses system.
- Managers are responsible for authorising the claims of their staff within two weeks of receiving an e-mail advising them that there is a claim waiting for approval.
- Managers must only authorise claims once they have evaluated each claim to ensure it is appropriate and verified that the necessary receipts & tickets have been provided.
- Managers are responsible for checking and ensuring insurance, driving licence and MOT documentation is recorded on an annual basis for each of their employees who are authorised to use their own vehicles for business mileage.
- Managers are to support the Trust's Green Transport Strategy and a Carbon Strategy Plan to minimise the environmental impact and cost of a journey.

6. Monitoring of compliance

Minimum requirement to be monitored	Process for monitoring e.g. audit/ review of incidents/ performance management	Job title of individual(s) responsible for monitoring and developing action plan	Minimum frequency of monitoring	Name of committee responsible for review of results and action plan	Job title of individual/ committee responsible for monitoring implementation of action plan
Application of policy	Departmental audits and detailed reviews.	Trust Auditors	As Determined.	Audit Committee.	Workforce Sub-Committee
As and when required	Investigations	Counter Fraud Specialist	As Required	Audit Committee	Workforce Sub-Committee
6 Monthly	Monitoring of Expense System	Assistant Director of Workforce Systems	As Required	Workforce Sub-Committee	Workforce Sub-Committee.

7. Relevant regulations, standards and references

7.1 References

- NHS Terms and Conditions of Service.
- Medical & Dental Staffs Terms and Conditions of Service.
- NHS Appointments Commission – Non-Executive Board Members Information Sheet.
- Leave of Absence Policy for Consultants

8. Equality, Diversity and Human Right Statement

The Trust is committed to an environment that promotes equality and embraces diversity in its performance both as a service provider and employer. It will adhere to legal and performance requirements and will mainstream Equality, Diversity and Human Rights principles through its policies, procedures, service development and engagement processes. This SOP should be implemented with due regard to this commitment.

9. Legal requirements

This document meets legal and statutory requirements of the EU General Data Protection Regulation (EU 2016/679) and all subsequent and prevailing legislation. It is consistent with the requirements of the NHS Executive set out in Information Security Management: NHS Code of Practice (2007) and builds upon the general requirements published by NHS Digital/Connecting for Health (CfH).

Appendix 1: Equality impact assessment

Title	
Strategy/Policy/Standard Operating Procedure	
Service change (Inc. organisational change/QEP/ Business case/project)	
Completed by	
Date Completed	

Description *(provide a short overview of the principle aims/objectives of what is being proposed/changed/introduced and the impact of this to the organisation)*

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Who will be affected *(Staff, patients, visitors, wider community including numbers?)*

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The Equality Analysis template should be completed in the following circumstances:

- **Considering developing a new policy, strategy, function/service or project(Inc. organisational change/Business case/ QEP Scheme);**
- **Reviewing or changing an existing policy, strategy, function/service or project (Inc. organisational change/Business case/ QEP Scheme):**
 - If no or minor changes are made to any of the above and an EIA has already been completed then a further EIA is not required and the EIA review date should be set at the date for the next policy review;
 - If no or minor changes are made to any of the above and an EIA has NOT previously been completed then a new EIA is required;
 - Where significant changes have been made that do affect the implementation or process then a new EIA is required.

Please note the results of this Equality Analysis will be published on the Trust website in accordance with the Equality Act 2010 duties for public sector organisations.

Section 1 should be completed to analyse whether any aspect of your paper/policy has any impact (positive, negative or neutral) on groups from any of the protected characteristics listed below.

When considering any potential impact, you should use available data to inform your analysis such as PALS/Complaints data, Patient or Staff satisfaction surveys, staff numbers and demographics, local consultations or direct engagement activity. You should also consult available published research to support your analysis.

Section 1 – Initial analysis

Equality Group	Any potential impact? Positive, negative or neutral	Evidence <i>(For any positive or negative impact please provide a short commentary on how you have reached this conclusion)</i>
Age <i>(Consider any benefits or opportunities to advance equality as well as barriers across age ranges. This can include safeguarding consent, care of the elderly and child welfare)</i>		
Disability <i>(Consider any benefits or opportunities to advance equality as well as impact on attitudinal, physical and social barriers)</i>		
Gender Reassignment <i>(Consider any benefits or opportunities to advance equality as well as any impact on transgender or transsexual people. This can include issues relating to privacy of data)</i>		
Marriage & Civil Partnership <i>(Consider any benefits or opportunities to advance equality as well as any barriers impacting on same sex couples)</i>		
Pregnancy & Maternity <i>(Consider any benefits or opportunities to advance equality as well as impact on working arrangements, part time or flexible working)</i>		
Race <i>(Consider any benefits or opportunities to advance equality as well as any barriers impacting on ethnic groups including language)</i>		
Religion or belief <i>(Consider any benefits or opportunities to advance equality as well as any barriers effecting people of different religions, belief or no belief)</i>		
Sex <i>(Consider any benefits or opportunities to advance equality as well as any barriers relating to men)</i>		

<i>and women eg: same sex accommodation)</i>		
Sexual Orientation <i>(Consider any benefits or opportunities to advance equality as well as barriers affecting heterosexual people as well as Lesbian, Gay or Bisexual)</i>		

If you have identified any **positive** or **neutral** impact then no further action is required, you should submit this document with your paper/policy in accordance with the governance structure.

You should also send a copy of this document to the equality impact assessment email address.

If you have identified any **negative** impact you should consider whether you can make any changes immediately to minimise any risk. This should be clearly documented on your paper cover sheet/Project Initiation Documents/Business case/policy document detailing what the negative impact is and what changes have been or can be made.

If you have identified any negative impact that has a high risk of adversely affecting any groups defined as having a protected characteristic then please continue to section 2.

Section 2 – Full analysis

If you have identified that there are potentially detrimental effects on certain protected groups, you need to consult with staff, representative bodies, local interest groups and customers that belong to these groups to analyse the effect of this impact and how it can be negated or minimised. There may also be published information available which will help with your analysis.

<u>Is what you are proposing subject to the requirements of the Code of Practice on Consultation?</u>	Y/N
Is what you are proposing subject to the requirements of the Trust’s Workforce Change Policy?	Y/N
Who and how have you engaged to gather evidence to complete your full analysis? (List)	
What are the main outcomes of your engagement activity?	
What is your overall analysis based on your engagement activity?	

Section 3 – Action Plan

You should detail any actions arising from your full analysis in the following table: all actions should be added to the Risk Register for monitoring.

Action required	Lead name	Target date for completion	How will you measure outcomes

Following completion of the full analysis you should submit this document with your paper/policy in accordance with the governance structure.

You should also send a copy of this document to the equality impact assessment email address

Section 4 – Organisation Sign Off

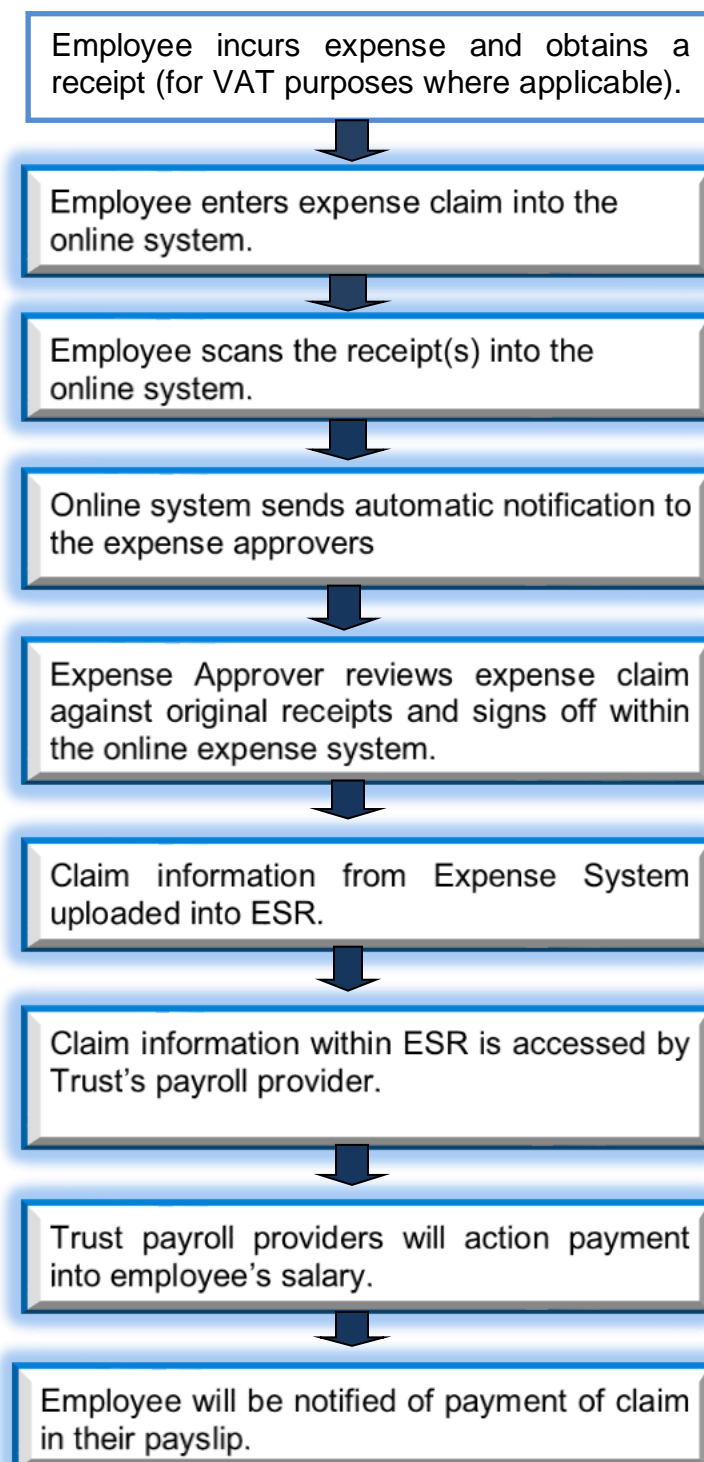
Name and Designation	Signature	Date
Individual who reviewed the Analysis		
Chair of Board/Group approving/rejecting proposal		
Individual recording EA on central record		

Appendix 2: Roles and responsibilities

Role	Responsibility
Chief Executive	The Chief Executive has overarching responsibility for ensuring the content of this policy is applied consistently and fairly across the Trust.
Chief Finance Officer	The Director of Finance is the named officer responsible for ensuring the content of this policy is applied consistently and fairly across the Trust.
Chief People Officer	The Chief People Officer is responsible for ensuring that an appropriate Expenses Policy and Procedure is in place. They are also responsible for ensuring that managers are supported in the implementation of the policy and procedure and that it is reviewed and monitored regularly.
Local Counter Fraud Specialist	The local Counter Fraud Specialist is responsible for creating an anti-fraud culture and investigating any suspicious activities.
Payroll	Required to process all authorised claims downloaded from the expenses system, within the agreed deadlines.
Human Resources	The Human Resources Department is responsible for advising and supporting managers and staff on the application of this policy.
Expenses Administration Team	<p>The Expenses Team will enter the details of staff submitting expenses registration forms into the expense system.</p> <p>They will be responsible for resetting of forgotten passwords</p> <p>They will ensure that all vehicle details are maintained in the online expenses system in accordance with completed registration forms.</p>

	<p>They will be the first point of contact for staff and the expenses software provider, to resolve any issues or queries regarding the expenses system or associated process.</p>
<p>Expenses System Provider</p>	<p>The Expenses software provider is responsible for maintaining the online expenses system.</p> <p>They are required to retain all submitted data/receipts.</p> <p>They are required to process all authorised claims through the on-line expenses system within the agreed deadlines.</p> <p>They are required to provide monthly reports on mileage claimed, compliance and performance targets.</p>
<p>Assistant Director of Workforce Systems</p>	<p>The Assistant Director of Workforce Systems is responsible for the monitoring of the expense software provider compliance and performance by requesting and analysing regular monthly reports.</p>
<p>Treasury Services Department</p>	<p>Treasury services are responsible for the process of allocating an order number following a request from an employee to facilitate booking of travel.</p> <p>The Treasury Services Manager/Senior Treasury Service Clerk, on receipt of a letter or e-mail requesting an order number, will cross check that the requisitioner is an authorised signatory of the trust as noted in the i-Proc Signatory List.</p> <p>The Treasury Service manager/Senior Treasury Service Clerk will advise the requisitioner that they can now contact the Trust Travel provider and quote the allocated order number.</p> <p>The Treasury Services manager/Senior Treasury Service Clerk will, on receipt of the travel provider's invoice, check the order number and details are appropriate and that the associated costs are charged to the appropriate budget.</p>

Appendix 3: Claiming Expenses Flowchart.



Appendix 4: Process and Requirements for Claiming Expenses

Expensed must be claimed using the Trust online Expenses system which has been in place since 2013. Two guides are available in relation to this process: -

Expenses – Your Guide to Online Expenses: Claimants
Expenses – Your Guide to Online Expenses: Approvers

These guides explain how to access the system and how to make and approve claims. They can be accessed on the Trust Intranet under HR and Organisational Development. Further information about the system is on the expense system provider website.

The system allows employees to input expense claims online, thus improving the speed and accuracy of the claim, and allows for the claim to be gradually built up over a period of time and for the claim to be tracked up to when it is paid.

It is the responsibility of all employees making claims to keep receipts appertaining to claims and these should be made available to Manager approving the claims. The system allows for the scanning and attachment of receipts to the relevant expense item on the claim. Original receipts should be kept for 3 complete tax years after the end of the tax year to which they relate in cases any queries are raised by HM Revenue and Customs.

Claims for expenses should be submitted immediately or within a month of the expenditure occurred using the online system. Where this is not possible the claim should be submitted no later than 3 months after the event. Any claims after the three months cut off will not be paid. The Trust recognises that there could be unforeseen circumstances such as sickness that could have prevented submission of a claim within the stated timescales. In such cases the Expenses System Manager and the relevant divisional manager will investigate and where it is deemed appropriate authorise payment of the late claim.

The submission deadline for fully approved online claims is 8th of each month. Claims submitted before the deadline will be paid in the same month. Claims submitted after the deadline will be paid in the following month. However, for December and January shorter submission deadlines are required these will be published at a month in advance.

Appendix 5: Travel Expenses

General

If you are attending a meeting or training as a Trust representative, or carrying out normal work away from base, the Trust will reimburse your expenses incurred, subject to the terms of this policy set out below. If public transport is appropriate, and in most cases it will be but the employee uses their own car the reserve rate will apply. It is expected, and in the employee's best interest, that agreement is reached between the employee and the authorising manager on the most appropriate arrangements **before** the expense is incurred.

Business Sustainability and Environmental Impact

If you can avoid travelling do so. For meetings involving Trust staff (offsite), ascertain if the meeting can be delivered effectively by telephone conference if possible. If you are the individual setting up the meeting, you should take the lead on this. If staff have to travel, train, tube and bus are the most sustainable options. If using private/lease vehicles, car-sharing will be both cost effective and more environmentally acceptable.

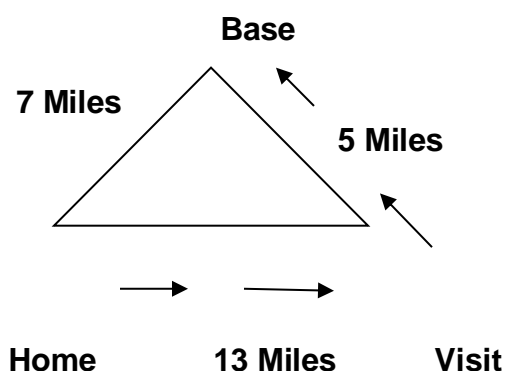
Journeys between Home and Headquarters or Place Visited

Unless staff have a contract of employment that identifies their home as their work base for mileage purposes, travel between an employee's home address and their place of work is the responsibility of the individual and will not be reimbursed.

Non-Executive Director are the exception to this as they are entitled to be paid for 'home to office' expenses as identified in Appendix 3.

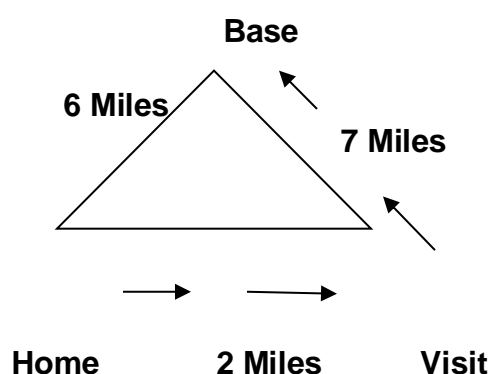
The following examples are given as a guide to when and how to calculate travel mileage

Example 1



Driving from home to a visit and subsequently onto your base is a total of 18 miles (i.e. 13+5). You can only claim 10 miles, which represents the return journey from your home base to the visit (i.e. 5+ 5) as you are not entitled to claim travel expenses from your home.

Example 2



Driving from home to a visit and then onto your base is a total of 9 miles. You must claim for these 9 miles and not the 14 miles return from your base to the visit, because the actual distance travelled was less than the return journey from your base to the visit.

Employees who are based at home for mileage purposes shall be paid at the appropriate rate for all journeys by the most direct route from their home to all places necessarily visited on duty and back to their home. This provision is subject to local management discretion in relation to on-call and the necessity to attend work without affecting efficiency or resulting in delays in timely attendance.

Returns to work

Staff who are required to return to work to attend for emergency duties or following any reasonable management request, may claim home to base (return) mileage or other transport costs. In these circumstances any expenses which are in excess of the expenses incurred as a result of the normal attendance at work which are actually and necessarily incurred will be reimbursed. For mileage the reserve rate will apply. There will be no payment where the employee has a season travel ticket that covers the journey made or where the time lapse between two periods is sufficiently short that it would have been reasonable for the employee to remain at or near their place of employment. However, in circumstances where travel back to the Trust cannot be completed in less than 30 minutes it is advisable for staff to remain on site and travel back to home can be claimed under the Reserve Rate.

The HM Revenue & Customs has strict criteria with regard to the taxation of such journeys. To satisfy as a non-taxable payment the employee must take full and sole responsibility for the emergency and this must be a medical emergency and be a 'life threatening' situation. If this criterion is not met the mileage claimed must be identified as taxable.

Other Allowances

Subject to the production of receipts, employees using their private motor vehicles on an official journey shall be refunded reasonable parking expenses and charges for tolls, congestion and ferries necessarily incurred, except that charges for overnight parking shall not be reimbursed unless the employee is entitled to a subsistence allowance for overnight absence. The Trust will not reimburse parking fines, congestion charge fines or fines for other motoring-related offences.

Consideration needs to be given to the cost of parking expenses with regards to reasonableness e.g., if it costs £10 to park your car at the station but a taxi from home to the station and return or use of public transport both ways would cost less, then it will be expected that these services are used or alternatively the expenses claim for parking should be no more than the taxi/public transport cost.

Change of Base of Work

Trust staff that are required to work at an alternative site on a temporary basis, which involves them incurring additional costs travelling to and from work, will be reimbursed at the reserve rate for the additional miles or for the appropriate (additional) bus/rail fare costs that are incurred.

Staff who are required to change their base of work on a permanent basis as a result of a merger of NHS employers or their acceptance of another post as an alternative to redundancy will be reimbursed their daily excess travelling expenses for a maximum period of four years from the date of the transfer, which may be subject to review in accordance with the terms of section 17 of the Agenda for Change Terms and Conditions. The excess will be calculated on the basis of bus fares or standard rail travel or, if the employee travels by private motor vehicle, on the basis of reserve rate mileage.

Appendix 6: Public Transport

Travel by Train

Staff are required to take advantage of the cheapest possible rail fares (including group rates as appropriate). Consultants are expected to use standard class travel unless a cheaper deal for first class can be secured.

The Trust recognises that peak hour fares to major cities like London are extremely expensive with few concessions available and employees are expected to consider additional steps to minimise costs such as travelling the evening before or delaying their return.

Taxis

Taxi fares will only be reimbursed in **exceptional** circumstances. These include: -

- When heavy or bulky goods/supplies need to be transported.
- When an adequate public transport service is not available, and this is the only feasible mode of transport.
- When a taxi would be more economical than the normal car mileage claims and any associated parking expense.
- When the saving in time is deemed to justify the payment.
- When on Trust business and travelling out of normal office hours for personal safety.
- When 2 or more staff are travelling together.

For taxi journeys to and from Trust premises the taxi should be booked through the Trust's General Office on the Trust account. For other taxi usage journeys should be evidenced to an agreed event/meeting and a receipt for the taxi fare paid must be obtained and submitted with the claim.

Car Hire

If a hire car is required, costs will be reimbursed where the member of staff is unable, or it is cheaper than, to travel by public transport or to use their own or lease vehicle. These costs must be authorised in advance by the authorising manager of the individual concerned on receipt of a written request from the employee, stating why it is recommended that a car hire should be approved.

Travel by Air

Travel by air will only be permitted if it can be demonstrated that it is cheaper than other transport alternatives or that taking into account the respective journey times and overall cost of the trip, better value for money can be obtained by flying.

If air travel is agreed, as with rail travel, the cheapest air fares must be obtained. Such travel should be limited in line with the Trust's commitment to environmental sustainability and will only be reimbursed where one or more of the following applies:

- No alternative form of transport is available or appropriate.
- To do so would produce a saving in overall cost (e.g., hotel and other travel costs).
- Time constraints warrant such travel.

All air travel should be by economy class, and in all cases, the cost of air travel must be authorised in advance by the authorising manager.

For consultants on study/professional leave, reimbursement of an air fare will be up to a limit of £275.

Any unnecessary additional expenditure costs charged by the airline will be the employee's responsibility i.e., excess baggage charges.

Employees should ensure that they had adequate insurance cover for air travel and associated expenses e.g., lost baggage, medical costs etc.