BrisDoc Patient care by people who care

NHS

Travel & Expenses Policy

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2.3	Mike Duncan (Head of People Team)	7th January 2019
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07/07/2026	Lewis Scandle (Interim CEO)	07/07/2027

Contents

Travel expenses Policy 2.2

1. Introduction

This policy has been developed to provide a clear understanding of the BrisDoc's principles regarding business travel and expenses. It also sets out the rules and guidance to be followed in authorisation and subsequent reimbursement of travel and related expenses arising out of official duties on behalf of BrisDoc. Travel is an integral part of the work of many co-owners and it is right that expenses incurred in travelling should be reimbursed. BrisDoc Healthcare Services will reimburse co-owners for reasonable expenses wholly, necessarily and exclusively incurred in connection with its business. Co-owners should not be either financially disadvantaged or advantaged because of genuine business expenses. In line with the Government's aim to promote healthier journeys to work and to reduce environmental pollution BrisDoc also operates a salary sacrifice cycle-to-work scheme.

The purpose of this policy is to provide:

• A structured framework to claiming expenses

• Practical guidance to co-owners and their managers on process and procedure

• Guidance to ensure that travel and expenses are claimed in a consistent, accurate and timely way

• Guidance on mileage allowance

• Guidance on entertainment allowances for line managers

The wellbeing of BrisDoc co-owners is paramount, so this policy is subservient to the Lone Working & Personal Safety Policy should any uncertainty arise.

2. Purpose and Scope

This document explains BrisDoc's Travel and Expense Policy, together with procedural guidance for all co-owners when completing and submitting claims. The purpose of this policy and procedure is to outline the rules set out by BrisDoc Healthcare Services for the reimbursement of travel and expenses that are necessarily incurred by any individual engaged on business approved by the organisation, and to reimburse the necessary costs of meals, accommodation and travel arising as a result of official duties away from home. The policy seeks to ensure that all co-owners know how to claim reimbursement for expenditure they have necessarily incurred during the course of their work. It sets out the duty placed upon co-owners to ensure any claims they make are accurate and legitimate. Line managers must be conversant with this policy, ensure that their direct reports are aware of it and comply with its requirements.

This policy and guidance apply equally to all co-owners, including Non-Executive Directors, and any persons representing or undertaking work on behalf of BrisDoc Healthcare where an agreement is in place to meet expenses. The policy does not apply to individuals that are self-employed, or work as contractors or consultants for BrisDoc Healthcare Service, nor to co-owners of the company that may be undertaking private work for other organisations, in which case the end client is responsible for meeting the cost of any expenses.

Any abuse of this policy will be investigated and may result in disciplinary action being taken. Deliberate falsification of a claim or the evidence needed to make a claim may constitute gross misconduct and may result in summary dismissal. “Falsification” includes the failure to pass on any discount obtained in the course of incurring an expense.

3. Duties and Responsibilities

Travel and expense claims are certificated by line managers by completion and signature of form in Appendix 1 and submitted to the Accounts Department (at Osprey Court) for payment or reimbursement. Managers will be expected to discuss and consider any request for a reasonable adjustment to allow a co-owner with a protected characteristic to be treated in a non-discriminatory way as a result of the application of this policy and the required adjustment put in place.

4. Travel Expenses

All travel approvers should:

• Be aware of and review official business travel being undertaken by their direct reports, including the reasons for it and the types of transport taken;

• Review working practices to ensure that they and their direct reports only travel when it is necessary;

• Ensure that any expense claims have been checked and are correct and that the expenses incurred were in line with business requirements before they are authorised and forwarded for payment.

All travellers should:

• Travel by the most cost-effective mode of transport taking into account journey time and the nature of the journey as well as the monetary cost.

• Ensure that vehicle insurance covers the use of the vehicle for business use

Alternatives to travel

BrisDoc is committed to reducing its overall impact on the environment. All travellers can contribute to achieving these targets by considering the alternatives:

• Consider if the journey is absolutely necessary? Could the meeting be effectively held in any other way which will result in reduced cost or environmental impact, i.e. telephone / video / web conferencing?

• If travelling to the same meeting as colleagues, consideration should be given to car-sharing or train / bus travel.

Eligible Miles

Co-owners will be reimbursed for miles travelled in the performance of their duties for BrisDoc which are in excess of the home to agreed work base(s) return journey. Eligible miles are normally those travelled from the agreed work base(s) and return. However, when the journey starts at a location other than the agreed work base(s) e.g. home, the eligible miles will be as set out in Appendix 2. (Also see section 4.4). Please note that BrisDoc’s Head Office is considered a ‘usual’ work base for all co-owners in relation to statutory and mandatory training requirements and therefore mileage to attend training will not be reimbursed.

Driving Cars, Vans, Motorbikes, Minibuses etc

In order to drive on BrisDoc business you must first undertake a:

• Driving Licence check

o Valid copy of your photo-card driving licence held on file

o Provide a Driving Summary document (with relevant code) to the Workforce Team – please see appendix 3 which provides instructions of how to do this.

• Insurance Schedule check

o You must ensure that your own insurance policy covers your car ‘for business use’ (including whether you are carrying passengers and/or stock or equipment). Whilst this is an individual responsibility and co-owners must seek clear direction from their insurance companies as to the type of cover, they need to undertake the various duties within their job responsibilities, BrisDoc requires you to provide a copy of your insurance schedule, confirming you are insured to use your own car for the relevant business use.

Mileage Rate

The mileage allowance is set by reference to the HM Revenue and Customs (HMRC) rules on AMAPs (Approved Mileage Allowance Payments). These are currently as follows:

Type of vehicle	first 10,000 miles	above 10,000 miles
Cars and vans	55p	25p
Motorcycles	24p	24p
Cycles	20p	20p

The co-owner is required to keep track of business mileage incurred in the tax year (6 April to 5 April) to ensure the correct rates are used. When a co-owner uses their own vehicle, the co-owner should ensure that the vehicle is in good working order, fully insured (including for business use), taxed and has a valid MOT. The department head/line manager may request the co-owner to share a snapshot of a route planner (e.g. Google maps) to support the business mileage claimed by that co-owner.

Other Allowances

Co-owners will be reimbursed the reasonable parking, garage, toll and ferry costs when on BrisDoc business on production of a valid receipt and expense form.

Training courses/Conferences/Events

All co-owners attending manager-approved training courses, conferences or events are eligible to claim mileage over and above home to work mileage where the training venue is not a standard work base (including Head Office). Course trainers providing training at a base other than their normal work base will claim mileage over and above home to work mileage on the relevant rate.

Travel by Public Transport

If public transport is used for business purposes, the cost of bus fares and rail fares will be reimbursed on production of a valid receipt and expense form. Co-owners should, as far as possible, obtain the lowest practical fare/rate should be selected within the permitted class of travel. All rail travel should be booked as standard class. Any exception will require a robust business justification and prior Director-level approval.

Travel by Taxi

Taxis should only be used when strictly necessary and where it is cost effective to do so. A receipt should always be obtained and submitted with an expense form.

Subsistence

Any co-owner who is required to be away from home for business purposes may claim for additional costs that are incurred. When a co-owner stays overnight in a hotel, guesthouse, or other commercial accommodation, the overnight costs will be reimbursed as follows: the actual, receipted cost of bed and breakfast, up to the normal maximum limit set out in below; plus a meals allowance, to cover the cost of a main evening meal and one other day-time meal, at the rate set out below.

Night allowances: first 30 nights

Actual receipted cost of bed and breakfast up to a maximum of -

Location	Upper limit
London (bed and breakfast)	£130
Bristol	£100
Warrington	£90
Reading	£85
All other UK locations	£75

Night allowances after first 30 nights: £35.00

Night allowances in non-commercial accommodation (ie staying with friends) per 24 hour period: £25.00

Day meals subsistence allowances are in line with the table and guidance below:

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Co-owner subsistence rates	Upper limits
One meal (5 hour) ceiling	£5
Two meal (10 hour) ceiling	£10
Three meal (12 hour) ceiling	£15
24 hour ceiling	£25

The period of absence is defined as the elapsed time from leaving home or normal operating base to return.

These expenses cannot be claimed if:

- a meal or beverage is not purchased
- the meal does not constitute additional expenditure
- the "staying with friends or relatives allowance" is claimed (in which case the 24 hour claim is not allowed)*
- meals have been taken at home
- meals are provided during a training course, conference or similar activity
- meals are provided on the train or plane and included in the ticket cost.

Additionally, alcohol cannot form part of any claim.

Where the maximum limit is exceeded for genuine business reasons (e.g. the choice of hotel was not within the co-owner's control or cheaper hotels were fully booked) additional assistance may be granted at the discretion of a Director.

Sundry Expenses

In exceptional circumstances it may be necessary for a co-owner to purchase sundry items which may be required in order to carry out their duties. Prior approval is required for all such expenditure to be accepted for reimbursement. BrisDoc Healthcare Services would not expect sundry items to be purchased if they could be obtained through the normal purchasing procedure.

Relocation

It is at the discretion of a Director (following advice from Workforce Team) to offer relocation expenses for any roles that are considered difficult to fill, e.g. if vacancy has been advertised on more than one occasion without success or the role is for a senior position. Any relocation expense will only be considered where –

- a new co-owner is moving area to start a job with BrisDoc

- an existing co-owner is changing their place of work within the organisation
- the co-owner's new home is reasonably close to the workplace and their old home is not
- the costs are paid before the end of the tax year that's after the one in which the co-owner started their job

Any cost approval will not exceed more than £8,000 within a single tax year and anything exceeding this level must be approved by the CEO or Commercial and Finance Director.

Exemption

There will be no reimbursement of:

• Parking fines

• Speeding fines

• A contribution towards vehicle running costs or additional personal motoring costs, (the mileage allowance is set at a level to include this).

5. Entertaining

Visitors

Co-owners should only entertain visitors and guests where it is likely to assist BrisDoc in its corporate objectives. Wherever possible, local café facilities should be used if meeting rooms unavailable or unsuitable. In general, entertainment counts as business-related if its purpose is to discuss a particular BrisDoc project, maintain an existing BrisDoc connection or to form a new BrisDoc connection. By contrast, entertainment of BrisDoc acquaintances won't count as business-related if its purpose is really social – even if there's some discussion of business-related topics in the course of the entertainment. Amounts claimed should be reasonable and appropriate and not exceed £25 per head. In all cases co-owners should retain all invoices/receipts and disclose the names and organisation of all attendees on the expense claim.

Co-owners

Line managers can use discretion for entertaining other BrisDoc co-owners in the course of their employment e.g. for informal team meetings, saying 'thank you', team socials, lunch meetings etc... Where this happens, prior approval must be sought from the Head of Service or Director. Amounts claimed should be reasonable and appropriate and not exceed £25 per head.

6. Procedure for making an expense claim

Travel and expense claim form for submission

The current Expenses Claim form can be found on Radar. Completed forms should be emailed to ap@brisdoc.org along with copies of receipts and email approval from your line manager or Head of Department.

All claims must adhere to this policy and be made within 1 month of the expense taking place - failure to do so may result in the claim being forfeited.

7. Review

This policy will be reviewed every 3 years but can be reviewed at any time if it is deemed necessary to do so or a review is requested by a co-owner.

8. Tables

Date	Reviewed and amended by	Revision details	Issue number
07/01/19	SM	First draft	0.1
22/01/19	CK	First review	0.2
30/01/19	KB	Second review	0.2
21/02/19	NG	Final review and sign off	0.3
14/03/2022	SH	Review	2.0
09/04/2025	JB	No changes, being reviewed due to new expenses system being introduced. Extended by 6 months.	2.1
28/10/2025	JB	No changes, being reviewed due to new expenses system being introduced. Extended by 6 months.	2.2
18/02/2026	LS	Additional clarity added around public transport expense. Sustenance allowances updated to reflect most recent rates. Further rules and clarity added around expenditure which can be claimed. Additional rules and clarity added for relocation expenses and limits.	2.3
10/03/2026	PR	Removed duplicated statements and updated the claim procedure to allow forms, receipts and evidence of approval to be submitted electronically.	2.4
19/06/2026	PR	Replaced references to ‘employee’ or ‘staff’ with ‘co-owner’. Added clause to Introduction to say this is subservient to the Lone Working Policy should any uncertainty arise.	2.5

Appendix 1

Travel and expense claim form: https://www.radar-brisdoc.co.uk/knowledgebase/electronic-mileage-expenses-form/

Appendix 2

Eligible Miles Example

In this example, the distance from the employee's home to the agreed base is 15 miles and is only travelling on a working day.

Journey (Outward)	Distance	Eligible Miles
Home to Base	15 miles	None
Home to alternative location / First Call	Less than 15 miles	Eligible mileage starts after 15 miles have been travelled
Home to alternative location / First Call	More than 15 Miles	Eligible mileage starts from home, less 15 miles

Journey (Return)	Distance	Eligible Miles
Alternative location / Last Call to Base	Eligible mileage ends at base	
Alternative location / Last Call to Home	Less than 15 miles	Eligible mileage ends 15 miles from home
Alternative location / Last Call to Home	More than 15 miles	Eligible mileage ends 15 miles from home

Appendix 3

Driving Summary Check

Driver check instructions

All staff members who drive either a BrisDoc vehicle, or their own vehicle for business use, must undergo a routine annual Driver Check as part of our duty to ensure all staff are safe to drive.

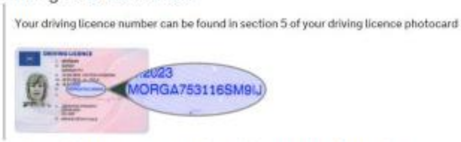
Staff are now able to undertake these checks themselves online; please can we ask that you do so and forward the report to the workforce support team via workforcesupport@brisdoc.org or Workforce Support Team, BrisDoc Healthcare Services, Unit 20 Osprey Court, Hawkfield Business Park, Whitchurch, Bristol, BS14 0BB.

Please find a set of instructions below in how to undertake these checks. If you have any problems with these or any queries or questions please contact your line manager or the Workforce Support team.

1. Ensure you have the following information:
    a. driving licence number
    b. national insurance number
    c. the Postcode on your driving licence
2. Go to https://www.gov.uk/view-driving-licence

3. Click Start Now
4. Type in the required information in the relevant boxes ie.

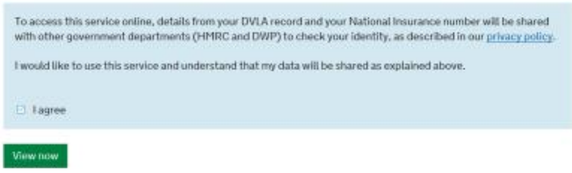
a. driving licence number



b. national insurance number, this can be found on:
   i. your National Insurance card
   ii. your payslip
   iii. P60
   iv. benefits information
   v. tax return

c. Postcode

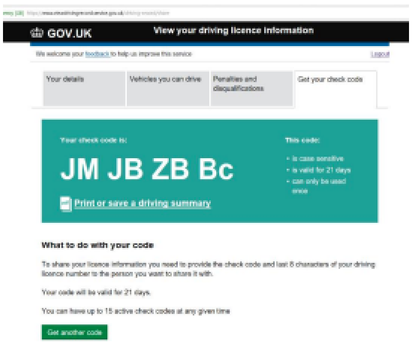
5. Tick the 'I agree' box (having read the relevant information).
6. Press 'View Now'



7. Check that the details are yours
8. Go to the 'Get your check code' tab.

9. Click 'Get a Code'

10. Once you have the code – click onto 'Print or save a driving summary'



11. There will be the option to open or save. Click Open.
12. The Driving Summary should open (normally in adobe acrobat)
13. Either:
    a. Print this document via – file, print
    or
    b. Save via – file, save as. Once saved the document can then be attached to an email message and emailed to workforcesupport@brisdoc.org