

Travel Expenses

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Policy

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 staff and it is right that expenses incurred in travelling should be reimbursed. BrisDoc Healthcare Services will reimburse employees for reasonable expenses wholly, necessarily and exclusively incurred in connection with its business. Employees 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 staff and 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

2. Purpose and Scope

This document explains BrisDoc's Travel and Expense Policy, together with procedural guidance for all staff 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 staff know how to claim reimbursement for expenditure they have necessarily incurred during the course of their work. It sets out the duty placed upon staff to ensure any claims they make are accurate and legitimate. Line managers must be conversant with this policy, ensure that their staffs are aware of it and comply with its requirements. This policy and guidance apply equally to all employees, 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 employees 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.

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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 an employee 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 staff, including the reasons for it and the types of transport taken;
- Review working practices to ensure that they and their staff 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

Staff 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 staff in relation to statutory and mandatory training requirements and therefore mileage to attend training will not be reimbursed.

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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 staff 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	45p	25p
Motorcycles	24p	24p
Cycles	20p	20p

The employee 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 an employee uses their own vehicle, the employee should ensure that the vehicle is in good working order, fully insured (including for business use), taxed and MOTd. The department head/line manager may request the employee to print off a route planner (e.g. Google maps) to support the business mileage claimed by that employee.

Other Allowances

Staff 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 employees 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.

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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. Employees should, as far as possible, travel standard class and should book their journeys sufficiently in advance to obtain the best possible prices.

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 member of staff who is required to be away from home for business purposes may claim for additional costs that are incurred. When an employee stays overnight in a hotel, guesthouse, or other commercial accommodation with the agreement of the employer, 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 £75

Meals allowance Per 24 hour period: £20.00

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

Night allowances: after first 30 nights Maximum amount payable: £35.00

Day meals subsistence allowances Lunch allowance (more than five hours away from base, including the lunchtime period between 12:00 pm to 2:00 pm) £5.00 Evening meal allowance (more than ten hours away from base and return after 7:00 pm) £15.00 .

Where the maximum limit is exceeded for genuine business reasons (e.g. the choice of hotel was not within the employee's control or cheaper hotels were fully booked) additional assistance may be granted at the discretion of the employer. Claims will be reimbursed on the basis of original receipts that must be attached to all claims. Copy receipts are acceptable, if agreed by the manager but these payments will be subject to income tax deductions. The organisation will not pay for the cost of any alcoholic beverages.

Sundry Expenses

In exceptional circumstances it may be necessary for a member of staff to purchase sundry items which may be required in order to carry out their duties. Prior approval for all such expenditure and original receipts must accompany the claim for reimbursement. BrisDoc Healthcare Services would not expect sundry items to be purchased if they could be obtained through the normal purchasing procedure.

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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.

5. Entertaining

Visitors

Employees 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 employees should retain all invoices. Please show names and organisation of all attendees on the expense claim.

Staff

Line managers can use discretion for entertaining other Brisdoc staff in the course of their employment e.g. for informal staff 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

All employees required to use their own vehicle for business purposes will have to provide the following documentation which will be copied and added to the employee's personal file. The documents must be kept up to date at all times.

- Driving Licence (paper and photo card)
- Car Insurance – including cover for business travel

Staff need to ensure that their own vehicle is roadworthy and fit for purpose (e.g. MOT, road tax) before using it for business (or any) use and therefore, by signing a mileage form, they are confirming that their vehicle is roadworthy and fit for purpose.

Methods of payment expenses

- Print off and complete the expenses claim form available on Radar (see Appendix 1).
- Ensure receipts and/or invoices are numbered and attached to the form which should also show the items numbered accordingly to enable easy identification.
- The employee needs to sign the form and obtain signed approval from the department head or their manager.

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- Forward the completed and signed form, with bills and vouchers attached to, accounts payable in the Finance team at Osprey Court or via accountspayable@brisdac.org. All claims should be made within 3 months of the expense taking place. Failure to do so may result in the claim being forfeited. Expenses payments will only be authorised if they are submitted on the correct form and accompanied by original receipts (except for mileage). Forms will only be accepted if the most direct route of travel is used. Only forms signed by an authorising manager will be accepted for payment. If the form is not signed it will be returned to the authorising manager, as will incorrectly completed forms. Payment may be withheld or delayed if the necessary documentation is not completed and appropriate procedures followed. It is the manager's/budget holder's responsibility to ensure that staff are made aware of the correct procedure to follow for the claiming of expenses.

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).

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 management or staff.

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

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Appendix 1

Travel and expense claim form

Name:		Click here to enter text.				
Account Name:		Click here to enter text.				
Account Number:		Click here to enter text.		Sort Code:	Click here to enter text.	
Details of expenses						
Mileage						
Type of transport	Post Code From	Post code To	One Way / Return	Total Miles	Total to claim	
Choose an item.	Click here to enter text.	Click here to enter text.	Choose an item.	Click here to enter text.	Click here to enter text.	
Choose an item.	Click here to enter text.	Click here to enter text.	Choose an item.	Click here to enter text.	Click here to enter text.	
Choose an item.	Click here to enter text.	Click here to enter text.	Choose an item.	Click here to enter text.	Click here to enter text.	
Choose an item.	Click here to enter text.	Click here to enter text.	Choose an item.	Click here to enter text.	Click here to enter text.	
Other Expenses						
Type of Expense		Reason			Total to Claim	
Click here to enter text.		Click here to enter text.			Click here to enter text.	
Click here to enter text.		Click here to enter text.			Click here to enter text.	
Click here to enter text.		Click here to enter text.			Click here to enter text.	
Click here to enter text.		Click here to enter text.			Click here to enter text.	
Total to claim					Click here to enter text.	
<i>I certify that this claim provides a correct record of expenses incurred by me and where applicable confirm that the vehicle used is roadworthy and fit for purpose:</i>						
Signature of Claimant					Date:	
Signature of Line Manager					Date:	

PLEASE SEND TO:

Accounts Payable, BrisDoc, Unit 21 Osprey Court, Hawkfield Business Park, Whitchurch, Bristol, BS14 0BB OR via accountspayable@brisdoc.org.

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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.

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a. driving licence number

Your driving licence number can be found in section 5 of your driving licence photocard



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'

To access this service online, details from your DVLA record and your National Insurance number will be shared with other government departments (HMRC and DWP) to check your identity, as described in our [privacy policy](#).

I would like to use this service and understand that my data will be shared as explained above.

I agree

[View now](#)

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

<https://www.ehwithinspectservice.gov.uk/driving-licence/code>

GOV.UK View your driving licence information

We welcome your feedback to help us improve the service [Logout](#)

Your details Vehicles you can drive Penalties and disqualifications **Get your check code**

Get a licence check code

You can get a check code to share your driving licence information with someone else, like your employer or a car hire company. You may need to do this if you want to hire a car.

You must also give them the last 8 characters of your driving licence number.

Your code will be valid for 21 days.

[Get a code](#)

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

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gov.uk | <https://www.roadtogetonandonline.gov.uk/driving-licence>

GOV.UK View your driving licence information

We welcome your feedback to help us improve this service. [Logout](#)

Your details Vehicles you can drive Penalties and disqualifications Get your check code

Your check code is:

JM JB ZB Bc

[Print or save a driving summary](#)

This code:

- is case sensitive
- is valid for 21 days
- can only be used once

What to do with your code

To share your licence information you need to provide the check code and last 6 characters of your driving licence number to the person you want to share it with.

Your code will be valid for 21 days.

You can have up to 15 active check codes at any given time.

[Get another code](#)

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@brisdock.org