

Travel & Expenses Policy



Through respect we will work together in Christ to develop the whole person

Written: November 2022

Date of Review: November 2023

Leader: Mrs C Sime

As a general rule, staff and governors will be reimbursed for all reasonable travel expenses which they incur wholly, necessarily and exclusively in the course of the School's business. The School must, however, ensure that such payments comply with Inland Revenue regulations and it is therefore essential that the rules detailed in this Policy are followed when making an expenses claim.

Petty Cash

A small number of items may be reimbursed through petty cash. Receipts must be provided and the petty cash slip authorised. Travel (i.e. mileage / petrol) must not be claimed through petty cash.








Authorisation of Expenses

The Head Teacher (in case of absence one of the Deputy Head Teachers) must authorise all types of expense claims.

Claims must be made within one month of the expense occurring.

Exclusions

The following do not meet the criteria for business expenses and must not be reimbursed.

-  Alcohol
-  Leaving gifts and similar
-  Parking fines and speeding fines
-  Bank charges and credit card interest
-  Travel between home and your place of work
-  Fuel, unless for use in a hire car
-  Gratuities

Mileage claims should be logged electronically via ORACLE (see later).

Local Bus & Rail Travel

Staff will be reimbursed for bus/rail travel for the necessary business costs incurred in the performance of their duties provided the expenses are reasonable and authorised.

Journeys between an employee's home and their normal place of work are not business journeys cannot therefore be authorised. If a staff member is at a different venue for a whole day this now counts as the normal place of work for the staff member. If a staff member travels to a venue for part of the day expenses can be claimed for the journey from school to venue.

Private Car

Where the use of public transport is not practical or economical, private cars may be used for business trips.

- ✚ Employees must present their insurance documents confirming that they have business insurance before the commencement of the trip.
- ✚ The policy must state business use – a clause that covers travel to and from work is not sufficient.
- ✚ This will then be logged onto ORACLE
- ✚ After the trip the employee must complete a mileage claim form within one month of the trip.
- ✚ Claims will be calculated using an internet mileage calculator from postcode to postcode.
- ✚ This will then be logged onto ORACLE and paid through their salary.
- ✚ The normal cost of travelling to and from their place of work must be deducted from the total mileage claimed.

Parking

Parking costs incurred in the course of business travel may be claimed.

Wherever VAT is charged on parking costs the employee should request a suitable VAT receipt to attach to their claim.

Taxis

The school has an account with Delta Taxis.

- ✚ All journeys must be authorised by the Head Teacher (in in case of absence the Deputy Head or Assistant Head).
- ✚ Journeys must be booked through the school office.
- ✚ No taxi expenses will be reimbursed on production of a receipt unless by prior agreement with the Head Teacher.

Subsistence

Employees who are required to work away from school for more than 5 hours or travel a distance of more than 5 miles may claim the cost of reasonable subsistence.

This will be paid on production of a receipt and must be pre-authorized by the Head Teacher.

Alcohol and gratuities will not be reimbursed.

A general guide to costs are:

Breakfast up to £6.03

Lunch up to £8.30

Tea up to £3.27

Evening meal up to £10.27

Business use of Home Phone or Personal Mobile

Where you use your home phone or personal mobile phone for business you may claim for the cost of the call if the call resulted in an additional cost (i.e. if you have exceeded your monthly minutes allowance because of business calls).

Your claim must be supported by an itemised bill and VAT invoice. The calls should be clearly highlighted and should indicate who the call was to.

Visas and Passports

If travelling abroad the cost of obtaining a visa is a reclaimable expense.

Goods and Services

On rare occasions it may be necessary for staff to purchase low value items and to reclaim this expenditure via staff expenses.

It must be noted that goods and services should only be obtained outside of official channels in cases of extreme emergency and staff should not use staff expenses to by-pass correct procedures.

Failure to adhere to correct procedures may result in your claim for reimbursement being rejected.

Business Entertaining

This must be done on school premises wherever possible.

VAT cannot be reclaimed on business entertaining.

Professional Fees and Subscriptions

Professional fees and subscriptions will not be reimbursed. However, in some cases, it may be possible to contact HMRC to obtain tax relief on subscriptions paid by individuals.

Clothing

Where necessary, school will provide you with any appropriate uniform items of clothing which will have a permanent logo attached or protective clothing where this is essential to the performance of your job. Any uniform or protective clothing requirements will be

ordered via school and therefore paid directly by school. No expense claims will therefore be allowed for any uniform or clothing items.

In addition, school will not reimburse any expenses incurred in relation to laundering your uniform clothing. However, employees can claim tax relief for cleaning or repairing specialist clothing such as uniforms or safety boots. The claim will have to be made directly with HMRC and not via school.

Medical Examinations & Eye Care

Where the school requires you to undergo routine medical health checks or screenings, the school will make the necessary arrangements with the medical practitioner and will pay directly the costs incurred. No expenses can therefore be claimed in this respect via the expense claim system.

The school will organise flu vaccinations for those staff who want them each year. If the school cannot arrange this with a supplier then the school will reimburse you the cost of your vaccination.

- ✚ You must complete the expenses request in advance of your vaccination and once authorised you should bring your receipt to be authorised and reimbursed.

If you are required to operate VDU equipment in order to carry out your duties for most of your working day, you are allowed to request an eye examination every 2 years.

- ✚ You must complete the expenses request in advance of your test and once authorised you should bring your receipt to be authorised and reimbursed.
- ✚ In addition, where an optician certifies that a new or altered prescription for glasses is required solely for the VDU usage, the school will bear the costs of frames, lenses and any special prisms or tinting, subject to the maximum of £45 (or £65 if the glasses cost in excess of £99) in so far as the cost relates only to the requirements for VDU usage.

Please note that expenses will only be reimbursed at the end of each month.

Expenses Claim Form

Name of Staff Member:

Date of Request:

Type of Request (e.g. sight test/flu vaccination):

Date of test/vaccination:

Supplier of test/vaccination:

Request authorised (signed by Head Teacher):

Date of receipt:

Receipt authorised (signed by Head Teacher):

Receipt reimbursed (signed by staff member):