Travel and Expenses Policy & Procedure

This policy was adopted from NYES HR template dated:	October 2024
This policy was adopted by the school on:	November 2026
Estimated next review date by NYES HR:	January 2027

Contents	**Page**
Introduction	2
Scope	2
Procedure	2
Appendix 1 – Green Travel Loan Scheme	5

1.0 Introduction

1.1 The Governing Body have adopted this policy as the statement of their commitment, and their processes, to ensure the consistent application of claims for travel and other expenses where these are incurred in the course of employment with the school.

1.2 As a North Yorkshire Council maintained school, the principals align with NYC's environmental principles in ensuring most efficient travel methods are used and supports staff who use public transport for commuting.

2.0 Scope

2.1 This policy applies to all employees of the school.

2.2 School leaders are responsible for implementing this policy consistently, ensuring that business journeys made in employee's personal vehicles are covered by insurance for business use, undertaking any necessary risk assessments regarding work related travel, and processing claims within reasonable timescales. Managers are responsible for taking a copy of employee's driving licence prior to their driving for work purposes, and the employees driving licence history should be checked by using the DVLA website. Managers are also responsible for taking a copy of employee's insurance documents confirming that they have business insurance on the policy to allow them to drive in connection with their work.

2.3 Employees are responsible for adhering to the policy, for making the best use of school resources when submitting a claim, ensuring that their insurance policy provides cover for any business journeys undertaken in their own personal vehicle, for submitting claims in a timely manner, and for bringing any issues to the attention of their line manager.

2.4 Claims are normally to be submitted within a three-month period of having incurred the expense unless there is a valid reason for delay. In exceptional circumstances, and where authorised by the Headteacher, a claim can be authorised up to one year after the expense has been incurred. Additionally, in exceptional circumstances, the school may consider issuing an advance of travel or expense costs being incurred so as to enable an employee's attendance and engagement in the relevant activity.

3.0 Procedure

3.1 All claims for work related travel or expenses, which meet the required criteria, should be submitted through MyView / the ESS Portal (as applicable) expense claim process, and must be authorised by the line manager.

3.2 Work related travel claims

3.3 The school is designated as the employee's official work base, and work related journeys should normally commence and cease at from this location.

3.4 Any non-routine business journeys should be discussed and agreed between the employee and line manager in advance.

3.5 When a journey commences from a point other than the school and / or when the employee does not return to school after their external appointment, but travels direct to their home, the mileage allowed will be the shorter of the distance between the work base and the address of the external appointment, and the distance actually travelled. These conditions are irrespective of the times journeys commence / finish.

3.6 Where work related travelling time results in the employee working additional hours than is usually required by their contract of employment, the manager and employee should agree in advance how the additional time will be recovered; typically, through time in lieu taken at an agreed time, or in some cases, payment for additional hours. Travelling time will not be credited for journeys to and from an employee's normal work base.

3.7 Claims for work-related mileage should be made in sufficient time to allow the manager to authorise for the claim to be paid in the following month's salary. Retaining VAT receipts by the employee for fuel purchased for a period of six years is a requirement to allow the council to recover VAT from HM Revenue & Customs on reimbursement of mileage claims made to employees. If employees leave employment of the school, all receipts held by the employee in support of claims made during the previous four years should be handed to the school for retention.

3.8 Mileage rates are agreed as part of the North Yorkshire Council collective agreement for support staff, and agreed to apply equally to

teaching staff and may be possible to claim additional tax relief on some business journeys. For details, please see the HMRC website.

3.9 Before making a journey, employees should select the route carefully to ensure that it is the most economical. This will usually be the shortest and most direct route, but you must consider the time that it will take. Travelling should be planned to reduce the total cost to a minimum. Every effort should be made to share journeys by travelling in one car where possible. Public transport should be utilised where this is available, and is economical in terms of time, cost, and environmental impact. Employees should use online tools or sat nav for distance checks but ensure that actual mileage is recorded from the car's milometer.

3.10 Cycle allowance

3.11 Staff who use a bicycle to travel in the course of duty may claim an allowance of £4 a week when a bicycle is used. Home to work travel is not covered.

3.12 Other work-related expenses

3.13 Agreed work-related expenses are payable only with receipts for the actual amount spent. Miscellaneous out of pocket expenses for items such as parking for attendance at an external meeting may be claimed. Where possible, tickets or VAT receipts should be provided.

3.14 Subsistence

3.15 Reimbursement of meal costs will not normally be paid unless there is a genuine and unavoidable additional operational expense incurred, in which case it will be considered. Such necessary business expenses would be reimbursed, where prior approval has been given, and must be supported by receipts up to the maximum amounts advised. Subsistence rates can be viewed below. Reimbursement for the cost of alcoholic drinks will not be considered and these must be deleted from any claimed receipt. All receipts must be retained locally to enable the employee to provide evidence of claims when requested to do so. Receipts should be retained for six years.

3.16 Subsistence allowances can be claimed only if they meet the following criteria set by the government tax office HMRC:

- Breakfast: a maximum of £5 where absence from the workplace is more than 5 hours and starts before 6am

- Second meal: a maximum of £5 where absence from the workplace is more than 10 hours

- Third meal: maximum £15 where absence from the workplace is more than 15 hours and work finishes after 8pm

3.17 The maximum rates payable for meals are:

Breakfast	£5
Second Meal	£5
Third Meal	£15

3.18 Staff who are required to stay overnight on official school business must book as soon as possible in advance via the school office. The cost of overnight stay will be kept to a minimum, and will be within the school's maximum rate payable for bed and breakfast accommodation which is:

B&B outside London: £100
B&B in London: £175