



**MELLERS PRIMARY SCHOOL  
BUSINESS TRAVEL SCHEME POLICY  
MAY 2013**

**BUSINESS TRAVEL SCHEME (LGS EMPLOYEES)**  
**(PEOPLE MANAGEMENT HANDBOOK FOR SCHOOLS)**

**1. Introduction**

1.1 Travelling expenses will be paid to employees who travel on the school or Council's business.

1.2 The following expenses will be paid:

- public transport rate (including standard rail fare);
- mileage allowance payments (where an employee is authorised to use their own vehicle for work purposes);
- taxi fares where a suitable alternative (including public transport) is not available.

1.3 The purpose of the scheme is to compensate employees for costs they necessarily incur in the course of their duties which are in addition to any travel costs incurred by the employee for non business travel. For example, where an employee purchases a bus pass for home to work and other non business travel purposes and this pass can also be used during working hours for business journeys, no additional expenses have been incurred by the employee and therefore no reimbursement is applicable.

**2. Authorised Business Travel**

2.1 National Conditions of Service state that 'employees required to use their motor vehicles for the efficient performance of their duties will receive allowances for the use of their motor vehicles on business only after being so authorised by the local authority'. The local authority may determine whether the use is casual or essential and the cubic capacity of the car considered appropriate. There is no obligation on casual users to provide a car for use at work.

2.2 An employee will be authorised to use their own car for work purposes where it is required for the effective performance of their duties and where the use of public transport alternatives is not available or would add significantly to the cost of travel or travelling time.

2.3 Where employees use their own car for journeys outside the County boundary, a comparison will be made against the equivalent public transport cost and where this is lower, and it is reasonable for the employee to make the journey by public transport, it is the equivalent public transport cost only that will be reimbursed.

2.4 Public transport should be used wherever possible, where this represents better value for money.

### 3. Journeys to and from home

3.1 Expenses will only be paid for journeys that form part of an employee's employment duties (e.g. journeys between schools or attendance at meetings). Journeys to and from an employee's normal place of work and their home are not covered. Where an employee travels to an alternative work base direct from or to home (e.g. to attend a meeting), only the travel that is in excess of what would normally be incurred (i.e. between the employee's home and normal place of work) may be claimed.

3.2 The following exceptions will apply:

- An employee who is at home on standby to be recalled to work will be eligible to claim for their mileage if they are called out, e.g. a Site Manager called out at night.
- Where an employee is required to attend to an emergency, an official meeting or other approved official business from home outside of their normal working hours, the maximum mileage that will be reimbursed will be 20 miles per return journey.

3.3 Where an employee's place of work changes the new place of work will be regarded as their normal place of work after four weeks have elapsed.

### 4. Mileage Allowance Payments

4.1 Where an employee is authorised to use their own vehicle for work purposes, mileage allowance payments (MAPs) may be claimed in accordance with the rules and rates determined by the HMRC from time to time. Current rates shown in the table below.

#### Tax – Rates per business mile

Type of vehicle	First 10,000 miles	Above 10,000
Cars and vans	45p	25p
Motorcycles	24p	24p
Cycles	20p	20p

4.2 Mileage logs should be fully itemised showing exact mileage and a description of the business journey (see Appendix A).

## **5. Car Parking Fees**

- 5.1 Where school or City Council business requires the payment of car parking fees, actual expenses shall be reimbursed provided that they have been reasonably incurred.
- 5.2 Where the school or City Council business is carried out within the City boundary, prior arrangements for free parking should be made where possible; where this is impossible, City Council Car Parks only should be used.
- 5.3 In all claims for reimbursement of car parking expenses, supporting evidence should be provided as to the destination of the employee and the address of the car park used.

## **6. Receipts**

- 6.1 For tax and audit purposes original receipts are required for reimbursement of expenses. Employees will be informed of any additional documentation required from time to time.
- 6.2 Employees will need to submit a VAT receipt (or receipts) with their mileage claim form. It does not matter if the employee purchases fuel for both private and business use; what does matter is that the total on the VAT receipt/s covers the cost of fuel used for the claim. A rough calculation would be to submit VAT receipt/s of at least £10 for every 100 miles of business travel claimed.

## **7. Approval**

All travel expenses claim forms, including mileage claim forms, must be checked and approved by the employee's head teacher/manager/schools Business Manager before submitting the form for payment.

## **8. No Claims Bonus Scheme**

- 8.1 The Council operates a No Claims Bonus Scheme to provide a measure of compensation for loss of bonus or payment of excess or both where private motor vehicles are used by employees in the course of their employment duties. The scheme will not give cover for journeys to and from the work base.
- 8.2 The Council's Insurance Section will be able to supply details of the scheme in operation from time to time.

## **9. Essential Users**

- 9.1 Essential user allowances will be as determined by the National Joint Council for Local Government Services with the following revisions:
  - Where cars of 1200cc and over are used, the mileage allowance payable will be at the rate set for cars of 1000cc to 1199cc
  - The mileage allowance payments will not exceed the rates determined by the HMRC from time to time.

- 9.2 An employee may be deemed an Essential User where they are required to provide a car for work purposes and their annual mileage can expect to exceed 8541 miles per annum. Those who cannot be expected to exceed this figure will not be considered for an essential user allowance.
- 9.3 Essential user allowances will also be granted below the 8541 threshold where the employee works in one of a small number of occupations designated by Councillors and there is a regular need to carry service users.
- 9.4 Essential user car allowances will be reviewed annually to determine whether employees awarded essential user status still meet the criteria. The criteria are also subject to review and may be amended by the Council from time to time. Following review, if an employee no longer meets the criteria to be considered for an essential user allowance, they will receive notice of the change of their status (in accordance with the schedule below) and the allowance will cease to be paid once the applicable notice period has expired.

#### **Financial Year**

2010/11	4 months' notice
2011/12	2 months' notice
2012/13	1 month's notice

- 9.5 Following review, employees no longer meeting the criteria will receive reimbursement for authorised business travel in accordance with the rates applicable for non-essential users outlined in this Scheme.
- 9.6 Essential Users are eligible to apply for a loan to purchase a car in accordance with the Council's Assisted Car Purchase Scheme . The Council's Insurance Section will be able to supply details of the scheme in operation from time to time.

#### **10. Disabled Employees**

Disabled employees who are unable to drive are allowed to use approved taxis for journeys which would otherwise qualify for a mileage allowance payment.

## BUSINESS TRAVEL/MILEAGE CLAIM FORM – TRM1

PLEASE USE BLOCK CAPITALS IN ALL SECTIONS

**\*\*These fields are mandatory and are to be completed in all cases.**

**PLEASE NOTE THAT THIS CLAIM MAY BE RETURNED IF ALL RELEVANT SECTIONS ARE NOT FULLY COMPLETED WHICH MAY THEN MISS THE PAYROLL DEADLINE. ALL CLAIMS SHOULD REACH THE SCHOOL'S PAYROLL PROVIDER BY THE DATE ADVISED FOR ACTION**

### SERVICE AREA DETAILS\*\*

NAME OF SERVICE AREA:		POST TITLE:	
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### EMPLOYEE DETAILS\*\*

SURNAME:		FORENAMES:	
NI NUMBER: (IF KNOWN)		PAYROLL NUMBER: (7 digits 1 ALPHA) (See payslip)	

### USER DETAILS \*\* (PLEASE TICK RELEVANT BOX)

<input type="checkbox"/> ESSENTIAL	<input type="checkbox"/> OCCASIONAL	<input type="checkbox"/> SLMG
<input type="checkbox"/> BICYCLE	<input type="checkbox"/> PUBLIC TRANSPORT	

### CAR DETAILS \*\*

MAKE/MODEL:	
VEHICLE CC:	VEHICLE REGISTRATION:

### CLAIM SUMMARY DETAILS – Please complete full details of claim on a mileage log sheet (to be retained by school)

<p style="text-align: center;"><b>PERIOD COVERED (date)</b></p>	<p style="text-align: center;"><b>MILES CLAIMED:</b></p> <p style="text-align: center; font-size: small;">(this is your official Business mileage AFTER your home to office and SLMG in-county mileage has been deducted)</p>	<p style="text-align: center;"><b>PUBLIC TRANSPORT COSTS:</b></p> <p style="text-align: center; font-size: large; font-weight: bold;">£</p> <p style="text-align: center; font-size: small;">(this is any costs incurred using public transport for business travel (please note you may be required to produce your ticket/s for audit purposes))</p>
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I claim the above mileage as having been driven on official business and in compliance with the Councils rules as detailed overleaf.

I hold a current driving licence authorising the use of the vehicle and a Motor Insurance Policy extended to cover the use of the vehicle for business use on behalf of the Council.

<b>Signature of claimant **:</b>	<b>Extension No:</b>
<b>Print Name:</b>	<b>Date:</b>

I certify that in my opinion the miles claimed and as shown on the mileage log, were made whilst on necessary official Council business and the mileages shown are reasonable.

N.B Actual Log sheets and VAT receipts should be retained by the school. These are not required by the payroll provider

<b>Line Manager Authorisation **:</b>	<b>Extension No:</b>
<b>Print Name:</b>	<b>Date:</b>

The information contained in/on this document/form is confidential and may also be privilege. It is for exclusive use of the addressee/s. This information is used solely to enable Nottingham City Council to perform its obligations under contracts of employment. If you are not the addressee, please note that any distribution, copying, or use of this message and information is prohibited. If you receive this information in error, please advise the sender immediately and delete/destroy it immediately.

**Please return completed form to:**  
 East Midlands Service Centre  
 Or alternative payroll provider (as appropriate)

# BUSINESS TRAVEL/MILEAGE CLAIM FORM – TRM1

## Completion Guidance

This form should be used to claim all types of business travel. Please ensure you complete all fields, each part should be self-explanatory but guidance is listed below for clarification.

### SERVICE AREA DETAILS

Please indicate your Service Area.  
Post Title is the name of the job you do.

### EMPLOYEE DETAILS

Full Name, National Insurance Number and Pay Number are required here.

*Your National Insurance Number can be found on the top left hand side of your pay advice/slip. The format of a National Insurance number is: two letters, six numbers followed by one letter, e.g. NC 12 34 56 C*

*Your Pay Number can be found in two places on your pay advice/slip. Just above the National Insurance number and on the front of your advice/slip above your name. The format of a pay number is: seven numbers and one letter, e.g. 1234567A. If you can't find it - ask your manager. It is also located on the absence recording system, CARS, possibly as contract number.*

### USER DETAILS

This is the type of travel user you are. Essential, SLMG and Casual are contractual users and will be noted in your contract of employment. All other car mileage claimants should use Occasional.

If you are using your bicycle for business journeys i.e. from office to office during working hours, you can claim an allowance and would tick the bicycle box.

If you are claiming public transport i.e. bus or rail fare you should tick the public Transport costs box. (Please note that bus or train ticket will need to be included)

### CAR DETAILS

Accurate details of your car are required to enable us to process your claim and ensure we provide details of your category to the Inland Revenue.

Please ensure you show the actual cc of your vehicle (this can be found on your Vehicle Registration Document).

### CLAIM SUMMARY DETAILS

Period Covered (date) is the whole period relevant for this particular claim.

Miles claimed is the total amount of miles for the period covered.

Public Transport Costs is the total amount you are claiming for Bus and/or train fare supported by the travel ticket(s).

Signature fields of Claimant and Line Manager must be completed in full i.e. Printed Names, Phone Extension Numbers, Signatures and Date of Signing.

Before approving journeys or signing claim forms Managers should have ensured that the amount claimed was the cheapest form of transport for the journey(s) claimed or be in a position to justify why a cheaper form of transport was not utilised.

Please return the form to:

East Midlands Service Centre  
or alternative payroll provider (as appropriate)

