

Department	HR		
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This document provides the Procedures relating to the booking of travel and the entitlement to Travel and Subsistence (T&S) claims.

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1. Travel between Edinburgh & Glasgow

Guidance for train tickets

For travel between Edinburgh and Glasgow rail tickets are available from HR. Please submit the completed Train ticket application [form](#) 48 hours prior to travelling.

Guidance for bus tickets

The budget liaison officer (BLO) will ultimately be responsible for ensuring that the bus tickets procedure is followed for each area.

Departments are asked to purchase Citysmart cards from Lothian Buses. These cost £30 and contain 20 adult single journeys. Note that they expire after 6 months.

If you have a GPC card

- Purchase Citysmart cards on-line using your GPC card at <http://lothianbuses.com/tickets/buy-online>
- Use internet explorer, not Chrome

If your area does not have access to a GPC card

- Raise an order for Citysmart cards in PECOS and select the supplier “Procurement”
- Use your area’s cost centre and account code 5534 (UK bus)
- Procurement will purchase the Citysmart cards online using their GPC card

- Procurement will pass the charge back to your area via the credit card system (Smartdata)
- Procurement will pass the Citysmart cards to you upon delivery
- If Citysmart cards are required on a regular basis, consider getting a GPC card for your area – contact Procurement for further details

Citysmart issuing procedures

- Citysmart cards must be kept in a locked place, ideally in a safe where available.
- Each area must keep records for issuing the Citysmart cards.
- Our auditors may ask to see these records
- The record will detail the unique 8 digit number relating to the card
- The record will be an excel spreadsheet detailing the following

Citysmart card number	Date of issue of Citysmart card	Issued by	Received by	Number of journeys	Date of return of card	Journeys remaining on card

- The card user states the number of journeys taken
- Keep a record of journeys remaining so that a replacement card can be ordered when there are 5 journeys left

If there is no Citysmart card available

- Staff will have to pay up front and claim the journey back on a T&S form.

2. Booking Travel & Accommodation

If you plan to travel by rail, air, or ferry and / or require overnight accommodation you should book your tickets and / or accommodation in advance through [tRIPS](#). Guidance on how to use the portal is available [here](#). If you are unable to make the arrangements through the portal, for example, an emergency or unforeseen appointment, you may purchase the tickets or book the accommodation yourself. You will be reimbursed for your costs if you attach the used travel tickets, or valid receipt to your claim form as proof of actually incurred travel costs.

You will require your cost centre code in order to book travel. Your cost centre can be found on [eSIP](#).

Rail Travel

tRIPS provides the facility to book train tickets to be collected from the fast ticket collection machines at railway stations. Fast ticket collection allows you to purchase your tickets on-line and collect your tickets at the train station you are departing from. If time allows, your tickets can be delivered by post. The rail booking guide is available [here](#).

Air Travel

Flights should be booked through tRIPS. Once you have submitted your travel request via the portal you will receive an e-mail confirmation. A record of the booking is also accessible from the baskets manager link should you require it at a later date. When you go to the airport for

your flight you will be required to produce your e-ticket and photographic ID. The flight booking guide is available [here](#).

The procedure for check in can vary with some airlines requiring you to check in on-line before the time of your flight so you should follow any instructions given in the e-mail you receive.

The use of open tickets or flexible tickets is significantly more expensive and must be authorised by a senior manager **and** the budget holder. On the rare occasion that a return flight is missed, it is still more cost effective to purchase a new single ticket at the airport than to purchase a fully flexible ticket just in case.

All airline tickets/confirmations are now electronic so no paper tickets are issued (or posted).

Ferry

Requests for Ferry tickets should be emailed direct to [Redfern](#).

Car Travel

If a number of people are travelling to the same location, or your location is inaccessible by public transport, it may be appropriate for you to use your car (if you have insurance that covers you for business use) or alternatively RoS may be able to provide you with an official car or a hire car. Please email: estatesservicedesk@ros.gov.uk for further information.

Taxi

Taxis should only be used for journeys for which there is no suitable method of public transport, where heavy luggage has to be transported to or from the destination or where there is a strong business reason. Taxi fares may also be paid where the use of taxis in conjunction with public transport is more economical than travel by private car. Where contracted taxi facilities are available, these should be used.

Accommodation

Hotels should be booked through [tRIPS](#) unless there are strong business reasons to use an alternative.

Redfern have access to all of the major hotel chains and can therefore make reservations across a wide spectrum of hotels.

Normally, the booking will include breakfast, however where this is not provided, the cost of breakfast can be added to the hotel bill. No other charges should be made to the hotel bill. Please view the 'full rate information' when selecting your hotel and make sure you are clear on the room basis (e.g. room only / bed and breakfast).

The hotel booking guide is available [here](#).

Staying with friends or family

Where it is convenient for you to stay with friends or family near to your temporary location you will be entitled to claim: Friends and family allowance together with a personal incidental expenses allowance as an alternative to using a hotel.

3. Expected Contact whilst travelling – Lone Worker Policy

Off-site Lone Working

It is the Line Manager's responsibility to ensure that safe working arrangements are in place. Please refer to the [loan working policy](#). Where it is not possible to devise arrangements for a person to work alone in safety then the work/activity is not to be permitted and alternative arrangements must be considered.

Traveller responsibilities:

- Make your Line manager or a trusted RoS colleague aware of your itinerary of visits
- Contact either by telephone, text or email your Line manager or a trusted RoS colleague at regular intervals or at a maximum 12 hour interval (even out with office hours)
- Sign in and out at visited site reception
- Ask the IT service desk to enable your RoS mobile device for roaming services
- Carry a mobile phone – make your line manager or a trusted RoS colleague aware of this phone number
- Ensure your electronic diary is kept up to date and read-only access given to Line Manager and / or RoS colleagues

Line Manager should: –

- Ensure that the [risk assessment document](#) has been read by the staff member in question RoS Lone Working Risk Assessment.
- Ensure that the person is capable of working alone. The Line Manager will need to consider both routine work and foreseeable emergencies that may post additional physical and mental burdens on the individual.
- Ensure that staff working alone understand the risks involved in their task and also what safety precautions will need to be taken. Examples would be ensuring that they are contactable, via portable or internal phone/radio, pre-arranged calls or physical checks by a second person.
- Provide suitable and sufficient training for lone staff that outlines the specific risks involved and how they can play a role in deflecting or minimising the risk.
- Establish emergency procedures in the event of an incident, including quick access to a safe area or exit from an unsafe location, evacuating other staff and informing the security team.

4. Emergency Assistance When Travelling

If you have booked travel or accommodation and need emergency assistance (for example, you need to cancel a flight out with office hours or you need information from our travel agent whilst abroad) you can call 0330 008 2000.

5. Cancelling Travel

Rail

Should you require a refund you must ensure that your tickets are returned to Redfern within 28 days from the date you intended to travel. The address where tickets are to be returned is on the front page of the tRIPS portal.

Hotels

Please refer to the cancellation policy you have booked through the tRIPS portal. If the policy states that the room can be cancelled, a cancellation box will be available for you to select. A confirmation email will be sent to you.

Air

Air travel is non refundable if booking an advanced restricted fare. Please email [Redfern](#) if you require to cancel your flight.

6. Travel & Subsistence Expenses and Claims

Advance of Salary

There may be times when staff have to pay for travel, accommodation or subsistence when travelling on business. If possible staff can use their own credit cards for these payments on the basis that their travel & subsistence claim will be paid before their credit card bill is due.

For staff who do not have this facility an advance of salary can be obtained by submitting a [Travel & Subsistence Advance Form](#). Advances will be paid into your payroll bank account unless alternative bank account details are provided.

Following your journey a [Travel & Subsistence Claim](#) form must be completed in all cases, even when no further payment is due to you. Unused advance sums of money must be refunded immediately.

Regular Travelers

If you travel regularly (more than 12 times a year) on official business you may apply for a [Temporary Standing Imprest](#) to meet your official travelling expenses. Repayment of standing imprests may be demanded at any time and should be made in any event as soon as there is a change in your travelling duties. If you retire or resign you must refund the imprest before you leave.

Imprests will be paid into your payroll bank account unless alternative bank account details are provided.

Following your journey(s) a claim form must be completed in all cases, even when no further payment is due to you. Unused imprests or credit balances must be refunded immediately.

Taxi

Taxi fares are admissible only for journeys for which there is no suitable method of public transport, where heavy luggage has to be transported to or from the destination or where there is a strong business reason. Taxi fares may also be paid where the use of taxis in conjunction with public transport is more economical than travel by private car. Where contracted Taxi facilities are available, these should be used.

What you can claim

1. Day Subsistence Eligibility

Staff are able to claim the actual receipted costs of subsistence provided these costs are reasonable. To be eligible to claim, you must be absent from your normal place of work or from home and have necessarily purchased prepared food or meal(s). Staff who are within a short distance of their permanent location and could potentially return to it will not normally be eligible to claim for subsistence.

2. Subsistence Allowance

All expenses claimed must:

- Be reasonable in nature and value (i.e. not excessive in terms of quantity or cost)
- Relate directly to the duty visit
- Constitute expenditure that would not have been incurred but for the visit

You can claim expenditure on food and drink in accordance within the following guidelines:

- Breakfast – where your detached duty visit necessitates a very early start from home, at a time when it would be unreasonable to take breakfast, and you buy during your journey
- Lunch or third meal – this might range from a sandwich to a hot or cold meal and non-alcoholic drink (e.g. tea, coffee, bottled water or soda). Any meal purchased should not exceed two courses.
- Dinner or main meal – this can be a hot or cold meal of up to three courses and non-alcoholic drinks can be claimed with dinner.
- Other refreshments – outside of normal mealtimes, you may find it necessary to buy some refreshments. This could be a mid-morning or mid-afternoon tea or coffee or other non-alcoholic drink. Minor food purchases (e.g. a biscuit) can also be claimed.
- The level of expense incurred should be equivalent to or less than the cost of the meal that would have been provided by the hotel you are staying at or at an event you are attending.
- Receipted gratuity and service charges can be claimed at approx. 10% of the bill total (un-receipted gratuity will not be reimbursed)

All receipts should be attached to your claim form. Subsistence is not payable when you are staying with Friends and Family other than the Friends and Family allowance and the Personal Incidental Expenses allowance.

3. Staying with friends or family

Where it is convenient for you to stay with friends or family near to your temporary location you will be entitled to claim: Friends and Family Allowance together with a Personal Incidental Expenses allowance as an alternative to using a hotel.

4. Personal Incidental Expenses Allowance

The Personal Incidental Expenses allowance is a non-receipted flat rate allowance which covers the cost of personal expenses necessarily incurred whilst you are away from home overnight, such as hotel laundry, personal telephone calls, newspapers, etc. It may be claimed when attending a residential training course.

5. Mileage Rates

When travelling by private car, mileage rates are £0.45 per mile and £0.02 per mile for the first passenger and £0.01 per mile for all additional passengers. Staff are reminded that when using their own car for official business and claiming motor mileage allowance they **must have appropriate business cover included in their motor insurance policy**. Staff are reminded that they must ensure that the most cost effective method of travel is undertaken at all times.

UK Subsistence Rates

Allowance / Expense Type	RoS Rate
Accommodation & Subsistence (Subsistence is not payable to members of staff visiting other RoS premises)	Reasonable expenses which have been actually and necessarily incurred and supported by receipts
Personal Incidental Expenses Allowance	£5.00 (Non-receipted) for 24 hour period
Staying with Friends Allowance	£36.00 paid through payroll and subject to tax and national insurance for an overnight stay
Mileage Rate	£0.45 per mile (car) £0.24 per mile (motor cycle), £0.05 per mile (passenger supplement) £0.20 per mile (pedal cycle) (SG rates)

T&S Claim Form

You should claim travel and subsistence expenses on the [Travel and Subsistence Claim form](#). There are separate pages for UK and foreign travel claims. There are distinct foreign entitlements. In making claims for reimbursement please ensure that you have followed the steps below:

- You **must** enter the times and location of departure and arrival in the appropriate columns of the claim form. This should include the times of leaving and returning to your permanent workplace, except where you make the journey direct from home or return direct to home. In such cases the times shown should either be the actual times the journey started and/or ended or the times which would have applied had the journey started and/or ended at the usual workplace, whichever is less.

- Indicate the nature of the expenses included in your claim by giving details of each journey and explanations of any unusual expenditure. It should be particularly noted that any claims for actual expenses require receipts for **every** item of expenditure.
- Claims for Personal Incidental Expenses Allowance are allowable where you have stayed overnight away from home. Receipts are not required for this allowance.
- You should list the places visited in such a way as to enable journeys and the claim to be followed with reasonable ease.
- Charges for rail, bus and taxi fares should be shown separately on a new page for each journey.
- All details should be clearly legible.
- Where journeys are undertaken by private vehicle, you must enter in the appropriate column of the claim form the actual mileage.
- Overwritten, altered or illegible claims will not be accepted by Finance therefore you should ensure that your form is correct before submitting it. If there are any inaccuracies the form will be returned to you for resubmission once the changes are made.
- You should ensure that receipts submitted in support of claims are accurate and unaltered.
- It should be stressed that if no receipt is supplied to correspond with payment requested within the claim form then no payment can be authorised. In the event that a receipt is not available or is lost, you must set out the circumstances and obtain written permission from your manager to make the claim.
- Family and Friends Allowance should **not** be claimed on this form but on the separate Staying with Friends Allowance [form](#).

Submitting the Claim form

It is your responsibility when making a claim for T&S allowances to ensure that the claim is fully completed and correct and that all items are properly receipted and attached to the form.

You are required to sign the completed form to agree that the information is correct. Failure to meet these requirements may result in the claim being returned and will delay your payment.

The submission of a fraudulent claim may constitute a serious disciplinary offence and may also result in criminal charges.

You should submit claims as soon as possible (generally within 3 days after the week to which the claims relate). If travel is infrequent and the monthly amount being claimed is less than £100, the claims may be submitted monthly, in the interests of cost effectiveness.

If you only make occasional journeys you should submit claims immediately after the journey. Any claim which is not submitted in a timely manner may be treated as a late claim and may be disallowed. Late claims are often difficult to check and will be accepted only when there is valid reason for the delay.