

This policy was adopted in Spring 23 and will be reviewed in Spring 26.

# Manor Hall Academy Trust



## TRAVEL AND EXPENSES POLICY

Responsibility for monitoring and reviewing this policy lies with the Central Trust Team and Directors. A review of this policy and recommendations for change should be presented to the Directors of the trust for verifications and consulted on with unions.

The Directors of the trust, in line with the Scheme of Delegation and Articles of Association have overall responsibility for the effective operation of MAT policies, but has delegated day to day responsibility to the Headteacher and LAB.

Directors will take account of recommendations from individual schools in review of this policy and seek HR advice as to such revisions.

Consulted with the JCNC	Spring 23
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Date	Version	Change	Origin of Change	Changed by
Spring 23	1	No changes – new Trustwide policy	Directors	KStaples

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## 1. Introduction and Scope

This policy applies to all people who are employed by Manor Hall Academy Trust and relates to the reasonable expenses that are incurred as part of your employment. This policy covers:

- Public Transport fares (buses, trains and trams)
- Air fares
- Own car use
- Mileage rates
- Out of Pocket expenses incurred
- Consequences of making a false claim.

## 2. Aims and Principles

Manor Hall Academy Trust is committed to ensure that there is a fair and consistent approach concerning the reimbursement of the expenses that our employees incur in the performance of their duties.

Manor Hall Academy Trust advises that expenses will be reimbursed on the basis that they are reasonable and that they have been correctly evidenced.

Where it is appropriate, all Manor Hall Academy Trust employees should consider whether the travel is required and whether alternatives such as teleconferencing and videoconferencing should be used instead.

## 3. General

Manor Hall Academy Trust states that official and sanctioned journeys should always been made in the most economical way. This will mean that for **longer** journeys **public transport** should be used (where there is reasonable access to it) if it is cheaper to do so, unless there is a reasonable reason for not doing so, such as unreasonable additional travelling time or accessibility.

To claim for expenses, an expense form should be completed and any relevant VAT receipts should be appended to the form. Where there is incomplete or insufficient information is recorded or it is not evidenced correctly, the claim form will be returned to the employee for them to review.

There is an onus on employees to ensure that they submit their claims for expenses in an accurate and timely manner (within 90 days of the expense) and that they avoid duplicating claims.

Approving managers should be robust in reviewing their claims that are submitted to ensure that they can satisfy themselves that they are accurate and there is no duplication.

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Managers should not certify claims that are submitted more than three months in arrears unless there is a reasonable excuse, such as illness, as to why it could not be submitted.

Claims for expenses will be paid into the same bank account as the employee's salary is paid.

## **4. Travel**

### **4a Public Transport Fares**

Public transport will be reimbursed for journeys from a work base to places visited, or the distance from the employees' home (if this is where the journey starts).

Employees may claim for standard class fares when using public transport. Wherever it is possible, tickets should be booked in advance so that the best value for money can be obtained. Please ensure that you have sought the prior agreement of a manager before booking tickets.

### **4b Taxi Fares**

Taxi fares will only be reimbursed in limited circumstances, for example, where taking a taxi would result in a significantly shorter travel time than using public transport, where there are several employees travelling together or where personal security and safety of employees is an issue.

Permission from the approving manager must be gained before travelling by taxi and if permission is not gained, or granted then you will risk not being able to claim for this type of expense.

A receipt with details of the date, place of departure and destination of the journey must be obtained if a claim for reimbursement is to be submitted.

### **4c Air Travel**

Travel by air must be authorised in advance by the Approving Officer. Where possible, flights should be booked well in advance to benefit from any discounts for early booking. Personal incentives or rewards associated with specific air travel, such as air miles, should not be a factor in determining which flight is purchased. The key consideration is whether or not the flight is the most cost-effective means of travel, unless there is a valid business reason for taking an alternative flight. Employees are usually only permitted to travel in economy class.

### **4d Your own car use**

Employees undertaking business mileage by private car will be designated occasional users, and are subject to:

- holding a full UK driving licence;
- ensuring that their car is roadworthy and fully registered; and

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- holding comprehensive motor insurance that provides for business use (and must cover liability for passengers, if applicable).

The Trust will not pay for the cost of any insurance policy on an employee's own car.

Your school is responsible for carrying out an annual check to ensure that employees who drive a car in connection with work meet the above conditions. These checks should be also be carried out whenever a vehicle has been changed. Please refer to the Driving at Work Policy for further guidance on management responsibilities (available on Parago).

## 5. Mileage Claims and Rates

### 5a Mileage claims

To claim occasional car mileage, employees should set out the distance of the journey undertaken on an expenses claim form. Each journey claimed should also include the start and end point of the journey. When claiming you should provide as much detail as you can to identify the start and end address.

You should deduct the mileage that you would travel from your home address to your usual place of work (e.g. Central Team Office or a school) when making a claim if you are starting the journey from the home. If you are starting from the office, you can claim the full mileage without deductions. If you are claiming from home, you must deduct your usual mileage to the Central Office or school.

**Example:** You live five miles away from the office and you are going to *A School* which is a journey of 20 miles each way. You are leaving from the office and returning to it. Mileage is paid at 45p per mile.

On the next day you travel to an all-day training event at *A Training Facility* and you are travelling from your home address and returning to it. The training facility is 20 miles away.

Date	From	To	Mileage	Deduction
01.01.2023	Office	A N School	20	0
01.01.2023	A N School	Office	20	0
02.01.2023	Home	A Training Facility	15	5
02.01.2023	A Training Facility	Home	15	5
Total			70	10
<b>You would be paid 70 * 45p = £31.50</b>				

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## **5b Mileage rates**

Manor Hall Academy Trust will pay mileage at a rate of the following rates per mile; Cars (including electric cars) = 45p per mile up to 10000 miles per annum (rolling 12 months) and 25p per mile thereafter.

Motor cycle users can claim 25p per mile.

Cyclists can claim 20p per mile.

You should ensure that you have obtain a petrol receipt which includes VAT details

## **6. Making a Claim**

When making a claim, you should complete a Mileage Claim Form, which you should sign and date. You should then submit to your manager to check and for signature. When submitting this, you should ensure that you have attached a VAT fuel receipt. You can find an example of the mileage claim form here. You can find a copy of the claim form as Appendix A

## **7 Completing a claim on MyView**

You can use MyView for submitting your mileage claim. Please refer to Appendix A for screenshots which detail how you can make a claim.

Before submitting a claim on MyView you will also need to register your car and its details on the system. This information is also listed in Appendix B

## **8. Expenses**

### **8.1 Parking and toll charges**

Manor Hall Academy Trust will pay for parking costs and toll charges incurred when travelling in connection with work. Receipts will be required.

### **8.2 Meals**

As a general rule, meal costs are the responsibility of employees whether at or away from normal work base. However, if work demands are such that an employee necessarily expends more than they would normally then the additional expenditure will be reimbursed provided there is management approval and appropriate receipts are available. Please note that you can claim a maximum of £5 for lunch and £25 for dinner. Please note that you can claim for food only and a soft drink.

### **8.3 Overnight stays**

Where an overnight stay is required, accommodation should be arranged and booked following approval from your approving officer. Reimbursement of any costs of meals together with further out of pocket expenses should be discussed with and approved by management before they are incurred.

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Concerning overnight stays we would expect you to have completed a thorough search to ensure that you are getting value for money and can demonstrate that the hotel that you have chosen is similar in price to others. You should also check whether the hotel includes breakfast or if there is a reasonable meal deal which can be added to the cost of the room.

## **9. Expenses that will not be reimbursed**

Manor Hall Academy Trust will not reimburse employees for:

- the cost of any travel between an employee's home and usual place of work;
- the costs of parking at the usual place of work;
- the cost of any travel undertaken for personal reasons; or
- alcohol
- any fines or penalties incurred while on business for whatever reason, including penalties for not paying for a rail ticket in advance of boarding the train and penalties or fines associated with motoring offences, including speeding or parking fines, clamping or vehicle recovery charges;

## **10. False Claims**

If Manor Hall Academy Trust considers that any expenditure claimed was not legitimately incurred on behalf of the Trust, it may request further details from an employee. We will thoroughly investigate and check any expenses claim as it sees fit, and may withhold payment where insufficient supporting documents have been provided. Where payment has been made prior to the discovery that the claim was not legitimate or correct, it may deduct the value of that claim from the employee's salary.

Any abuse of this policy will not be tolerated and may be dealt with under our disciplinary procedure, which can be found on Parago.

## **11. Review**

The policy will be reviewed in the light of operating experience and/or changes in legislation and in consultation with the Trade Unions.

## **12 Documents referred to in this policy**

[Mileage Claim Form](#)

Screenshots from MyView

Driving at Work Policy

Disciplinary Policy

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## Appendix A: Mileage and Expenses Form

MILEAGE CLAIM FORM					
Name:		Paye Ref:			
Reg. Number:		Agreed Centre for Mileage:	marcus house		
MILEAGE DETAILS				MILEAGE TOTALS	
Date	From (Postcode)	To (Postcode)	Purpose	Non Taxable	Non Payable
Total				0	0

EXPENSES			
Date	Details of Expenses	Purpose	Amount
Total			£ -

RECEIPTS	
I have included all VAT receipts with this claim: <input type="checkbox"/>	
Before Certifying scroll down to read the Terms & Conditions.	
CLAIMANT	AUTHORISING MANAGER
Signed:	Signed:
Date:	Date:

TERMS & CONDITIONS
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**CLAIMANT**

I The claimant, by signing/completing the claimant certification box above certify that:-

- A) The claim correctly states the business expenses I have incurred in carrying out my duties and complies with Manor Hall Academy Trust conditions.
- B) the vehicles(s) used is licensed, covered by a valid MOT Certificate and insured for Business Purposes.
- C) I held a valid driving licence during the period of this claim.

**AUTHORISING MANAGER**

I the authorising manager, by signing/competing the authorising manager certification box above certify that:-

- A) Duties and total amounts claimed have been examined and agreed in the light of duties performed and can be appropriately evidenced.
- B) VAT Receipts to cover all fuel and VATable non fuel expenses have been examined and retained.
- C) I am authorised to certify he claim under the scheme of delegation.

Office Use Only

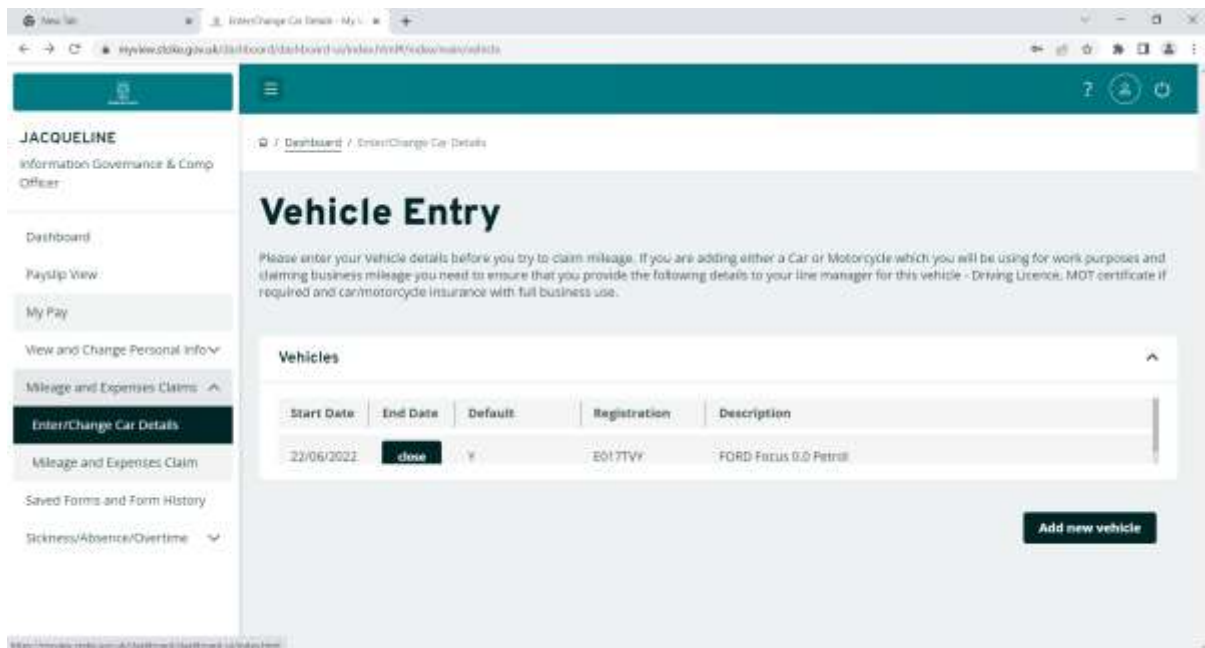
Verified:

Entered by/Date:

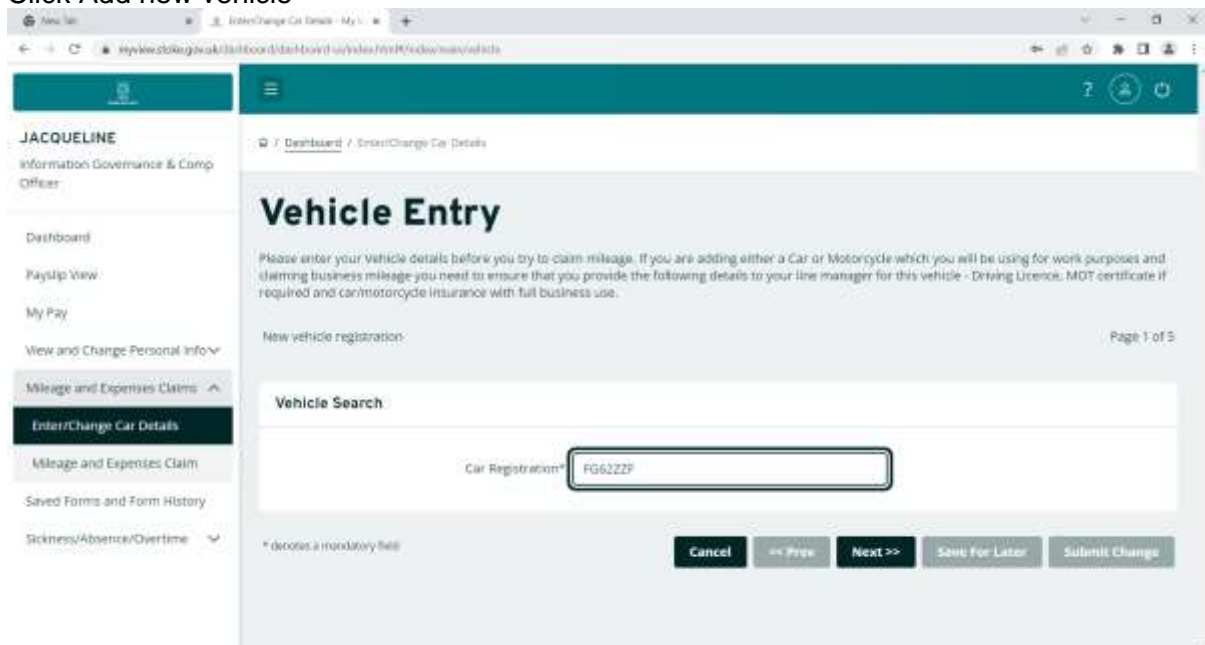
## Appendix B Adding your car on MyView

To add your car on My View

Log into My View and Click on Mileage and Expense Claims and then Enter/Change Car Details



Click Add new vehicle



Enter your vehicle registration and click next

**JACQUELINE**  
Information Governance & Comp Officer

## Vehicle Entry

Please enter your Vehicle details before you try to claim mileage. If you are adding either a Car or Motorcycle which you will be using for work purposes and claiming business mileage you need to ensure that you provide the following details to your line manager for this vehicle - Driving Licence, MOT certificate if required and car/motorcycle insurance with full business use.

New vehicle registration Page 2 of 5

### Vehicle holding

Effective Date\* 14/11/2022

End Date

Vehicle replacing -Select-

Is your previous vehicle still available to you?

Is this your default vehicle?

\* denotes a mandatory field

Cancel < < Back Next >> > Skip and Enter Submit Changes

Click on the effective date and state the date you want the new car to be listed from. Click Next.

If you are replacing the car, please state which car you are replacing and whether you still have access to the other vehicle

## Vehicle Detail

Car Registration: FG622ZF

First Registered\* 14/11/2022

Make\* Aston Martin

Model\* X5

Ownership\* Privately owned car

Fuel Type\* Petrol

Engine Size\* 3

CO2 Value\* 99

Electric Range

\* denotes a mandatory field

Cancel < < Back Next >> > Skip and Enter Submit Changes

Complete the vehicle details and click next

Using business mileage you need to ensure that you provide the following details to your line manager for this vehicle - Driving licence, MOT certificate if required and car/motorcycle insurance with full business use.

New vehicle registration. Page 4 of 5

### PIID Detail

Vehicle-Type\* Car

Transmission\* Manual

List Price\* 100000

Accessories Value (New) 10000

Accessories Value (After New) 10000

\* denotes a mandatory field

Cancel << Prev Next >> Save For Later Submit Change

Complete this page stating what type of vehicle, the transmission and the value

Please enter your Vehicle details before you try to claim mileage. If you are adding either a Car or Motorcycle which you will be using for work purposes and claiming business mileage you need to ensure that you provide the following details to your line manager for this vehicle - Driving licence, MOT certificate if required and car/motorcycle insurance with full business use.

New vehicle registration. Page 5 of 5

### Ownership

Road Fund Band Petrol CO2 151 - 165

Road Fund Due Date 30/04/2023

insurance Due Date 25/11/2022

MOT Due Date 20/03/2023

Cancel << Prev Next >> Save For Later Submit Change

Complete and then click submit change

## Appendix C: Making a Claim on MyView

1. Complete a Mileage Claim form and get it signed by a manager. Make sure you have a VAT receipt
2. Log onto MyView
3. Click on Mileage and Expenses Claim
4. Complete this page and press done.

The screenshot shows a web browser window displaying the 'Create Expense Claim' page. The user is logged in as JACQUELINE, Information Governance & Comp Officer. The page title is 'Create Expense Claim' and the main heading is 'New Claim'. Below the heading, there is a note: 'By submitting any mileage claims you are confirming that you have a full UK driving licence, valid MOT if required for vehicles over 3 years old and you must have valid car insurance which covers you for using your vehicle for business use. Your line manager can ask to see these documents at any point.' The form contains three main sections: 'Enter your claim form information here:', 'Position' (a dropdown menu with 'Information Governance & Comp Officer' selected), 'Description' (a text box with 'Car Mileage for October'), and 'Reason for Claim' (a larger text box with 'Car Mileage for October 2022'). A 'Done' button is located at the bottom right of the form. The left sidebar shows navigation options like 'Dashboard', 'Pay Slip View', 'My Pay', 'View and Change Personal Info', 'Mileage and Expenses Claims', 'Enter/Change Car Details', 'Mileage and Expenses Claim' (highlighted), 'Saved Forms and Form History', and 'Sickness/Absence/Overtime'.

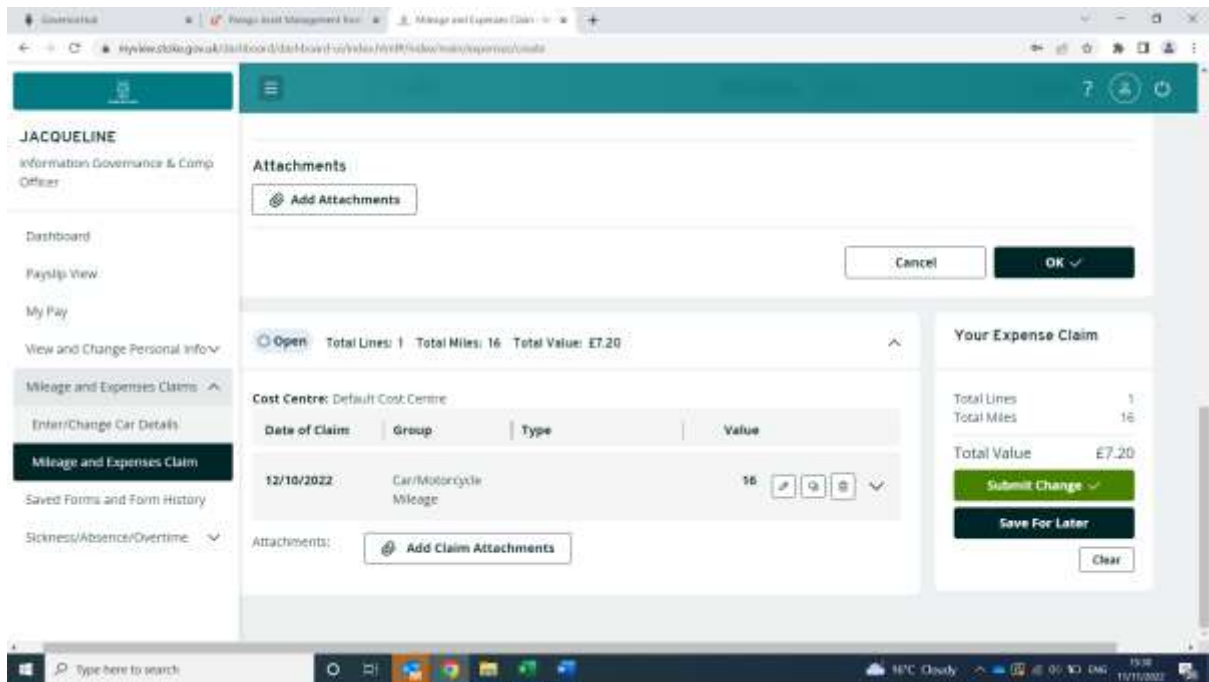
5. Click on Add Line

This screenshot is identical to the one above, showing the 'Create Expense Claim' page in MyView. It displays the 'New Claim' form with the same fields and values: Position 'Information Governance & Comp Officer', Description 'Car Mileage for October', and Reason for Claim 'Car Mileage for October 2022'. The 'Done' button is at the bottom right. The left sidebar and user information are also the same.

- 6.. Click on Add Line:
  - a) Add date of claim
  - b) The group car/motorbike mileage
  - c) Description – for example mileage claim for October 2022
  - d) Add Mileage
  - e) Date of journey
  - f) Click Vat receipt
  - g) Attach a copy of your VAT receipt and claim form
  - h) Click ok.

The screenshot shows the 'Create Expense Claim' form for 'Car Mileage for October'. The form is titled 'Car Mileage for October Information Governance & Comp Officer'. It includes a 'Form info' button. The 'Claim Information' section has a 'Date of Claim' field set to 12/10/2022 and a 'Group' dropdown menu set to 'Car/Motorcycle Mileage'. The 'Description' field contains 'Add details' and has a '1000 characters remaining' indicator. The 'Mileage Information' section has a 'Journey' dropdown menu set to '- Select Journey -', a 'Mileage' field set to 234, and 'Start' and 'End' date fields set to 21.09.2022 and 21.09.2022 respectively. There is a 'Via' field and a 'Return Journey' checkbox. A tooltip on the right says 'Distance us calculate the value from the nearest per compa'.

The screenshot shows the 'Mileage Costs' and 'Attachments' section of the form. The 'No. of Passengers' field is set to 1. The 'Mileage Costs' section has an 'Est. Claim Value' field set to £105.30, a 'VAT Receipt' checkbox that is checked, and a 'Taxable' checkbox that is unchecked. The 'Cost Centre' field is set to 'Default' and has a 'Search' button. The 'Attachments' section has an 'Add Attachments' button. At the bottom, there are 'Cancel' and 'OK' buttons. A summary bar shows 'Total Lines: 1 Total Miles: 16 Total Value: £7.20'. Below this, there is a table with columns 'Date of Claim', 'Amount', 'Type', and 'Value'. The 'Your Expense Claim' section shows 'Total Lines: 1' and 'Total Miles: 16'.



7. You will need to complete a separate entry for both legs of the journey
8. Each journey will need to be completed separately.
9. Once completed press on submit change.
10. It is recommended that you do this at the end of the month so that you can account for all journeys in the same claim.