

Travelling Expenses & Subsistence

Policy and Procedures



Comhairle Ceantair
**an Iúir, Mhúrn
agus an Dúin**

**Newry, Mourne
and Down**
District Council

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1.0) Policy Statement

Newry, Mourne and Down District Council recognises that as an employee you may incur necessary additional expenditure on travel and subsistence in the course of your employment. The purpose of this policy is to allow you to claim **additional expenditure incurred** whilst on authorised Council business.

The Council accepts that no employee should lose out financially in carrying out their duties and should be properly recompensed for additional expenditure incurred.

This policy does detract from or reduce any entitlements as set out in part 3, section 6 of the National Agreement on Pay and Conditions of Service (updated June 2005)

2.0) Scope

This policy applies to all employees of Newry, Mourne and Down District Council.

3.0) Definitions

3.1 Business Travel

Travel by a council employee while undertaking their duties, for example:

- 3.1.1 Travel between Council Offices/Depots,
- 3.1.2 Travel to 'off site' meetings,
- 3.1.3 Travel to attend authorised Learning and Development events,
- 3.1.4 Travel to other local authority offices.
- 3.1.5 Travel to meet customers or clients,
- 3.1.6 Travel to undertake inspections eg, Building Control/Environmental Health etc

Business travel **does not** include the following:

- 3.1.7 Travel between home and your normal place of work,
- 3.1.8 Travel to attend recruitment and selection processes,
- 3.1.9 Travel costs incurred as a result of a permanent change to your normal place of work.

3.2 Casual Car User

Casual car users are those employees for whom it is desirable that a private car is available to use as and when required.

3.3 Essential Car User

Essential car users are those employees whose duties are of such a nature that it is essential for them to have a private car at their disposal whenever required. Essential user status is attached to particular Council posts and **not** to an individual employee (see [6.0\) Essential Car Users](#))

3.4 Home

Your normal place of residence, the location you travel from and return to at the start and end of each working day.

3.5 Normal Place of Work

Your usual place of work, as defined in your statement of main terms and conditions, you travel to and from each working day.

3.6 Home to Work Mileage

Any travel from home to your normal place of work is classed as home to work mileage. Home to work mileage is not reimbursed since employees are responsible for their usual travel to work expenses.

3.7 Private Car

A motor car which is:

- owned outright by you **or** being purchased via a credit agreement,
- **and** which is registered in your name,
- **or** a vehicle under a lease agreement in your name.

3.8 Roadworthiness

A vehicle being used in undertaking Council business is appropriately maintained in accordance with the relevant road traffic legislation, has appropriate insurance, up to date Vehicle Excise Duty and where required a valid MOT certificate.

4.0) Business Travel - Introduction

If you travel on Council business from your normal place of work (as defined in your statement of main terms and conditions) to other locations using your own vehicle, or public transport, you can claim for the cost of this travel. If using a vehicle you claim for the business related mileage. If you use public transport you will claim the cost of the fares.

The Council are entitled only to reimburse the travel costs for the most appropriate route.

4.1 Business Travel – Calculating Your Claim

If you travel from your normal place of work to another location on authorised Council business and return to your normal place of work you may claim mileage for the journey. If you travel to more than once location you can claim the mileage from leaving your normal place of work until you return to it.

If you travel from your home to another location without including your normal place of work you can claim the full mileage minus the distance of your usual home to work mileage. If you travel fewer miles than your home to work mileage you will not be able to make a mileage claim for that journey.

If you travel to a different location as a detour on your way either to or from your normal place of work you can claim for the business mileage minus your normal home to work mileage. For example:

Example 1

An employee whose normal place of work is Monaghan Row is required to attend a meeting at the Civic Centre in Downpatrick at the start of their working day. After this meeting they are required to travel to Monaghan Row for the remainder of their working day.

| | | |
|------------------------------------|--|--|
| Home Hilltown (BT34 5UH) | Normal Place of Work Monaghan Row (BT35 8DJ) | Home to work Mileage 10 miles |
| Home Hilltown (BT34 5UH) | Destination Downpatrick (BT30 6RA) | Home to Destination Mileage 22 Miles |

| | |
|--|------------------------|
| Mileage to be claimed | Miles |
| Outward journey (home to Downpatrick) | 22 |
| Return Journey (Downpatrick to Monaghan Row) | 32 |
| Subtotal | <u>54</u> |
| Less Home to Work Mileage (1x10 miles) | -10 |
| Total to claim | <u>44 miles</u> |

In this example the employee can claim for 44 additional miles over and above their normal home to work mileage.

Example 2

An employee whose normal place of work is Downshire Civic Centre is required to attend an all day event at Lagan Valley Island (Lisburn and Castlereagh City Council)

| | | |
|--|---|--|
| Home Ballynahinch (BT24 8EY) | Normal Place of Work Downpatrick (BT30 6RA) | Home to work Mileage 11miles |
| Home Ballynahinch (BT24 8EY) | Destination Lisburn (BT27 4RL) | Home to Destination Mileage 10 Miles |

| | |
|--|-----------------------|
| Mileage to be claimed | Miles |
| Outward journey (home to Lisburn) | 10 |
| Return Journey (Lisburn to home) | 10 |
| Subtotal | <u>20</u> |
| Less Home to Work Mileage (2x11 miles) | -22 |
| Total to claim | <u>0 miles</u> |

In this example the employee has travelled 2 miles less than their usual home to work mileage and therefore they have not incurred any additional mileage and cannot make a mileage claim.

If you claim for business travel the Council is entitled to only reimburse the mileage for the most appropriate route. For example if the shortest route involves travelling by minor roads but you choose to take a longer journey via main arterial routes the Council has the discretion to only pay the mileage that applies to the shortest route.

Mileage claims should be rounded to the nearest whole number for example:

| | Actual Distance (miles) | Mileage to Claim (miles) |
|-----------|-------------------------|--------------------------|
| Journey 1 | 17.3 | 17 |
| Journey 2 | 11.5 | 12 |
| Journey 3 | 0.4 | 0 |

4.2 Business Travel Using Public Transport

You can claim travel expenses if using public transport for business travel providing you have relevant receipts for all journeys. You may claim the full amount of the receipt, although if you normally commute to work via public transport you should deduct the cost of your normal journey from the claim. As with claims for mileage using your own vehicle, the Council is entitled only to reimburse the amount based on the most cost effective way of travelling.

4.3 Travel by Taxi (private hire or hackney cab)

Taxis should not be used within the Council district other than in exceptional circumstances and where no other form of public transport is reasonably available. You should seek your Line Manager approval for using a taxi before a journey is made and receipt(s) should be obtained as proof of expenditure if making a claim.

4.4 Multiple Travellers (Passenger Miles)

If you are travelling with other employees to the same location car sharing should be used. The Council will pay a passenger allowance (Passenger Miles) of 5 pence per passenger, per business mile, to promote car sharing wherever possible. If car sharing is impractical or uneconomical e.g. the other employees live miles apart, or none of you will be returning at the same time or to the same location, consideration should be given to car sharing for part of a journey.

For example 3 employees from Downpatrick, Castlewellan and Saintfield (whose normal place of work is Downpatrick) travelling to a training event in Monaghan Row:

Employee 1 (Saintfield) – travels to Downpatrick to meet Employee 2

Employee 2 (Downpatrick) – Employees 1 and 2 travel to Castlewellan to meet employee 3

Employee 3 (Castlewellan) – Employees 1,2 and 3 travel together to Monaghan Row.

In this example either employee 1 or 2 would use their car for the entire journey.

| Journey | Business Miles | Passengers | Passenger Miles |
|------------------------------------|---|-------------------|---------------------------------|
| <i>Saintfield to Downpatrick</i> | <i>0 (this is normal home to work mileage for employee 1)</i> | <i>0</i> | <i>0</i> |
| <i>Downpatrick to Castlewellan</i> | <i>12</i> | <i>1</i> | <i>1 2 @ £0.05 per mile</i> |
| <i>Castlewellan to Newry</i> | <i>19</i> | <i>2</i> | <i>19 @ £0.05 per mile x2</i> |

If deciding to car share and one employee is an essential car user they take precedence over a casual user for claiming business mileage as essential users are required to have use of a car for official business as a condition of essential user status.

Essential users cannot claim for passenger miles and should always be the designated driver in the event of a car sharing journey.

4.5 Travel by Air, Sea or Train

If you are required to travel by air, sea or train on Council Business, approval must be sought in advance from your line manager before purchasing tickets. Approval will only be given where there is a proven saving in time or money over other forms of travel.

Any travel booked must be at the lowest possible fare. Proof of travel (tickets, boarding passes etc) must be produced in order to claim reimbursement.

4.6 Journeys in Excess of 100 Miles

For single road journey in excess of 100 miles consideration should be given to using an alternative form of transport.

For Example

An employee based in the Civic Centre in Downpatrick is attending an event in the centre of Dublin. The distance by road is in excess of 100 miles one way. The total mileage costs, parking charges and road tolls may be greater than the cost of using public transport to attend the event.

A calculation should be carried out before travel commences to confirm the use of business travel by car is the most cost effective.

5.0) Environmental Awareness

The Council encourages all employees to limit journeys where possible in order to reduce costs to the rate payer and limit pollution. As a Council employee you have a part to play in limiting business travel where possible. When practicable you should consider use of video/telephone conference facilities to limit travel between Council Buildings. Dedicated video conference facilities are available in both Monaghan Row and the Downshire Civic Centre. Telephone conference calls can also be made from all meeting rooms in the Downshire Civic Centre. Mobile conference calling via Vidyo is currently being rolled out across the Council which will allow for video conference facilities to be available via Council supplied portable devices such as laptops, mobile phones and tablets.

If organising meetings where other employees are required to travel consideration should be given to minimise travel. This may be done by scheduling meeting locations centrally to the meeting population, to avoid unnecessary travel for large groups of employees.

Plan your time to minimise journeys between different Council sites. If your role requires you to undertake inspections or scheduled visits, for example in Environmental Health or Building Control, ensure these visits are carried out in a systematic manner. Where possible, schedule inspections/visits in a particular area during the same time period to avoid unnecessary travel between locations.

If you have a visit or inspection close to home arrange, where possible, to carry out this on the way to or from work.

6.0) Essential Car Users

The Council pays an Essential Car User (ECU) allowance to certain employees whose current role within the organisation determines they are an essential car user. You will have been advised if your role has been classed as an essential user.

The purpose of this allowance is to ensure that a vehicle is immediately and normally available to enable essential users to fulfil their duties. If you are an essential user it is expected that you will have a vehicle for use, without notice, on a daily basis. The essential user status applies to your role and not you personally. If you were to move to another role within the Council that was not eligible for an ECU your allowance would cease at the point of taking up your new post.

6.1) Essential User Designation

At least 1 out of the following 3 statements must be met before a post qualifies for an ECU allowance:

- 1) Is there a statutory obligation, or specific requirement to respond to matters relating to public safety or health?
- 2) Is the officer in post subject to immediate call out to respond to emergency situations?
- 3) Is it expected that the officer will exceed 8,000* business miles (pro rata for part time employees) per annum?¹

* Business mileage exceeding 8,000 miles per annum averaged over the previous 2 years. New posts cannot be considered for essential user status until business mileage of 8,500 has been submitted for any given year.

Business mileage will be reviewed annually to ensure compliance with these procedures.

6.2) Approval Process

ECU applications are approved via either the Corporate or Senior Management Team.

Applications made below Assistant Director level should first be agreed with the relevant Assistant Director. Following Assistant Director approval the application must progress for approval by the CMT.

Applications made at Assistant Director level should first be agreed with the relevant Director. Following Director approval the application must progress for approval by the SMT.

¹ If you are employed as one of a group of employees in the same role and simply by reason of geographical area you are unable to meet the 8000 mile threshold your ECU will not be removed. For example you are based in Monaghan Row and the majority of your business miles are within the City of Newry, your caseload while being comparable to your colleagues would not require large amounts of travel between appointments and therefore you may not reach the business miles limit. In this example you would not be treated differently to your colleagues and would continue to receive your ECU allowance.

6.3) Essential Car User Allowances

| Essential User | Engine Size | | |
|------------------------|-------------|-------------|-------------|
| | 451-999cc | 1000-1199cc | 1200-1450cc |
| Lump Sum per annum | £846 | £963 | £1,239 |
| Per mile (first 8,500) | 36.9p | 40.9p | 50.5p |
| Per mile (after 8,500) | 13.7p | 14.4p | 16.4p |

Up to date information relating to allowances can be found on the Council's intranet site.

You will receive the monthly allowance automatically each month regardless of whether or not you submit a mileage claim. Payment for each business mile travelled will only be paid upon completion, and subsequent authorisation, of a mileage claim.

6.4) Vehicle Not in Use

As an essential user if your car is not available as a result of mechanical defect or you are not able to attend work due to sickness absence you will continue to receive your lump sum payment for the remainder of the month in which the car first went out of use and for a further 3 months after thereafter.

For the following 3 months your lump sum payment would be reduced by 50%. After this period you would no longer receive a lump sum payment until your vehicle was back in use, or you had returned to work if you had been absent due to sickness absence.

During a period where you are at work and your car is off the road for repairs, reimbursement in respect of travel by another form of transport will be made to you by the Council at public transport rates.

6.5) Other Absences from Work

If you are absent from work for any of the following reasons:

- unpaid authorised absence,
- unauthorised leave,
- career break,
- parental leave,

you will not receive your lump sum payment for any such period and payment will cease with effect from the 1st day of absence and only be reinstated upon your return to work.

6.6) Removal of ECU Allowances

If following review it is determined your post no longer qualifies for an ECU allowance you will be informed of the reason for the decision and given 12 weeks' notice that your allowance will end.

If your ECU allowance is removed you will be designated as a Casual Car User (CCU) and will be entitled to claim for business mileage at the rates defined for casual car users.

If you have an outstanding loan under the Councils Assisted Car Purchase Scheme at the time your ECU allowance is removed your current loan agreement will remain in place until the outstanding balance is repaid in line with your loan agreement.

6.7) Car Loan Scheme

If you are an essential user you may be eligible to apply to the Council for a loan to purchase a car, full details of the scheme including eligibility criteria can be found in the Car Purchase Assistance Scheme.

7.0) Casual Users

If you are a Casual Car User it is desirable that you have a car available to use as and when required. Mileage rates are as set out below and up to date information can be found on the Council intranet.

| Casual User | Engine Size | | |
|------------------------|--------------------|--------------------|--------------------|
| | 451-999cc | 1000-1199cc | 1200-1450cc |
| Per mile (first 8,500) | 46.9p | 52.2p | 65.0p |
| Per mile (after 8,500) | 13.7p | 14.4p | 16.4p |

Mileage claims should be made via Transfare.

8.0) Driving Documentation and Insurance

Regardless of your car user status, if you use your own vehicle to travel to and from work or to claim business mileage it is your responsibility to ensure that it is roadworthy at all times, that your vehicle is taxed and has a current MOT certificate (if required). You must also ensure that you have a valid driving licence and are fully insured.

If you use your own vehicle to travel to and from work your vehicle insurance should usually cover your commute to work. However if you use your vehicle to travel on Council business either as a casual or essential user you should check with your insurers that your policy covers you for business purposes. If your level of cover does not cover you for business purposes you should add this to your policy.

Copies of your vehicle logbook, current insurance (including business cover) and MOT (if required) should be provided to Payroll to enable the processing of your business mileage claims.

Each year you will be required to provide a copy of your car insurance and MOT (if required) to the Council. Upon changing your vehicle you must provide updated details to the Council (ie copy of new logbook, insurance certificate and MOT if required) as soon as possible after purchase.

The Council will not pay claims for business mileage without the appropriate documentation.

The Council will not accept responsibility for any form of claim involving your own vehicle and will not pay any excess or insurance penalties you incur either travelling to or from your place of work or whilst driving on Council business.

8.1) Driving Licence

If applicable, you will have provided a copy of your driving licence to the Council when you commenced your employment as part of your reference checks. During your employment you will be required to provide a copy of your licence to the Council from time to time, for example:

- In response to periodic checks made by the Council's Fleet Manager,
- Upon the renewal of your licence (usually every 10 years)
- In the event of you starting a post in which you start to claim mileage either as a casual or an essential user.

If during your employment you receive endorsements or penalty points as a result of driving/motoring offences you must bring these to the attention of your line manager as soon as possible.

9.0) Parking Charges and Fines

You will be reimbursed for car parking charges associated with the duties of your post upon production of a valid receipt. You should endeavour to use the cheapest and most suitable car park and avoid unnecessary expense to the Council. The Council reserves the right to only pay for the cheapest form of parking.

You are responsible for any fines associated with excess parking times (for example overstaying at a Pay and Display car park) parking fines will not be paid by the Council. Likewise any parking fines connected with parking contraventions (for example parking on double yellow lines) will not be paid by the Council.

You should raise any claims for car parking via the Transfare system.

10.0) Meetings at the Start or End of your Working Day

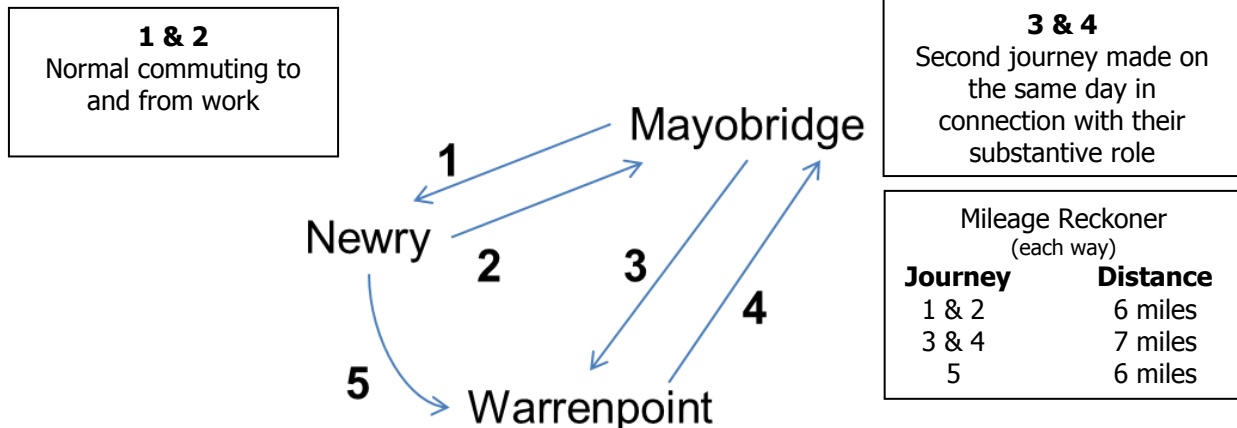
If you are required to attend a meeting, appointment or other Council business at either the start or end of your working day at a different location to your normal place of work you can claim travelling expenses for that element of the journey which is **over and above** your normal home to work mileage.

If you are required to attend, for example a Council or Committee meeting at the end of your working day and travel home after the meeting you will not be able to claim business miles for this journey home, as this is a journey you would have made regardless of the meeting. For example your normal place of work is the Civic Centre in Downpatrick and you are required to attend a Committee meeting in the same building at the end of your working day, your journey home after the meeting is your normal home to work mileage which the Council are not responsible for funding.

11.0) Return to Work

If you are required to return to your usual place of work or another location as a requirement of your role after completing your usual journey to and from work for that day you are entitled to claim mileage for this journey.

For example an employee, who lives near Mayobridge, whose normal place of work is Monaghan Row is required to attend an evening public meeting in Warrenpoint the following would apply:



The mileage incurred for journeys 3 and 4 can be claimed as this is a second journey made in connection with the employee's substantive role.

Alternatively

If the employee decided to travel from Newry to Warrenpoint (journey 5) and not return home at the end of their working day they could claim the mileage for journey 5. Following the meeting they would travel home (journey 4) and claim for this mileage less their normal home to work mileage (journey 2) eg

Journey 5 6 miles to claim
Journey 4 7 miles to claim
13 miles (less 6 miles for journey 2 – normal home to work mileage)

Total to Claim 7 miles

Return to work does not include travel to work under a 'split shift' arrangement.

12.0) Additional Hours, Overtime and Mileage Claims

If you choose to work additional hours either by way of working overtime or working an additional shift to build up time in lieu, you will not be able to claim mileage for any journey made in connection with this. For example an employee in a leisure centre staying on at the end of their shift on overtime to provide cover would otherwise have made their normal commute home at the end of their shift and have not incurred any **additional** costs by choosing to work the overtime.

If you volunteer to work overtime or additional hours outside of your normal working pattern at your usual work location, for example you normally work Monday to Friday and volunteer to work overtime on a Saturday, you cannot claim mileage for any journey made in

connection with this work. You have chosen to work these additional hours either for payment (overtime at the appropriate rate) or time off in lieu at a future date, and any mileage expenses associated with this will be treated as home to work mileage which the Council are not responsible for reimbursing.

If you volunteer to work overtime at another Council location which results in you having to travel further, over and above your usual home to work distance, you can claim for the additional mileage. For example:

An employee whose normal place of work is Monaghan Row and who works Monday to Friday is required to work overtime at the Civic Centre in Downpatrick on a Saturday.

| Home | Normal Place of Work | Home to work Mileage |
|---------------------|-----------------------------|------------------------------------|
| Hilltown (BT34 5UH) | Monaghan Row (BT35 8DJ) | 10 miles |
| Home | Destination | Home to Destination Mileage |
| Hilltown (BT34 5UH) | Downpatrick (BT30 6RA) | 22 Miles |

| Mileage to be claimed | Miles |
|--|------------------------|
| Outward journey (home to Downpatrick) | 22 |
| Return Journey (Downpatrick to home) | 22 |
| Subtotal | <u>44</u> |
| Less Home to Work Mileage (2x10 miles) | -20 |
| Total to claim | <u>24 miles</u> |

In this example the employee can claim for 24 additional miles over and above their normal home to work mileage.

13.0) Emergency Callout and Mileage

If you are required to attend work as a result of an emergency call out you will be entitled for mileage for this journey from your home as this journey is not part of your regular home to work mileage.

14.0) Subsistence – Meal Allowances

It is accepted that costs for meals taken while you are at work either at your normal place of work or travelling elsewhere in the district are your responsibility. All Council buildings have facilities for preparing and or heating/cooking a suitable meal and canteen facilities are available at both Monaghan Row and Green Bank sites.

However it is recognised that if you have to travel outside of the Council district or you are away from your normal place of work during a mealtime, and a meal has not been provided, you may be eligible to make a claim. You must remember there is no automatic entitlement to claim a subsistence allowance and the following criteria must be met:

- 1) **Additional Expenditure** – have you incurred **additional** expenditure for purchasing a meal over and above what you would **normally** spend?
- 2) **Normal Arrangements** – have you been prevented from following your **normal** meal arrangements?

Example 1

An employee whose normal place of work is the Downshire Civic Centre who regularly buys their lunch each day from a sandwich shop, garage, convenience store etc is in Monaghan Row over their meal break can choose to either eat in the canteen or buy their lunch, as they would normally do, from a retailer in the City. No additional expenditure has been incurred and therefore no claim can be made.

Example 2

An employee whose normal place of work is Monaghan Row and either purchases their lunch in the canteen or brings in a meal from home is working in the Downshire Civic Centre for a day. As the working day in the Civic Centre is likely to be planned in advance they can choose to bring a meal from home, purchase a meal en route to eat later, or buy a meal in Downpatrick. No additional expenditure has been incurred and therefore no claim can be made.

14.1) Normal Meal Arrangements

There are generally three main types of working pattern which are connected to your eligibility to claim for subsistence.

Fixed Base

If you work at only one Council location and on exceptional occasions are asked to go out on Council Business from which you are unable to return to your normal place of work for lunch your entitlement to claim subsistence will depend upon whether you have incurred **additional expenditure** in purchasing a meal of similar standard to that which you would normally have taken. As travel from your normal work base is infrequent any change to your work location is likely to be planned in advance thus allowing you to make suitable provision and avoid any additional expenditure.

Regularly Away From Your Normal Place of Work

If your duties are such that you are a mobile worker, for example working in refuse collection, it is likely you will be away from your normal place of work during meal times. However due to the regularity of your work you will be able to plan for your meal breaks and can take your breaks at other Council Facilities.

If you are required to undertake a series of appointments as part of your working day for example working in Environmental Health, you would be expected to co-ordinate your day to enable you to return to your normal place of work or another Council facility for your meal break. Alternatively due to the planned nature of the work you would have the option to bring a meal from home or to purchase a meal en-route to eat later.

In these circumstances no additional expenditure would be incurred and therefore you would not be eligible to make a claim for subsistence.

Sometimes Away From your Normal Place of Work

In other circumstances you may be required to travel from time to time to other Council facilities or meetings in connection with your role and therefore would not be in your normal place of work during meal times. In these circumstances arrangements would usually be made in advance and you would be able to make suitable provision for your meal breaks to avoid additional expenditure.

14.2) Disruption to Normal Working Arrangements

The Council recognises from time to time your normal working arrangements may be disrupted at short notice and as a result of this you may incur **additional** costs for subsistence. In these circumstances subsistence claims for **additional actual** expenditure incurred may be claimed as follows:

| Meal | Criteria | Maximum Amount of Claim |
|--------------|---|--------------------------------|
| Breakfast | If you have been away from your normal place of work for over 4 hours before 11am | £5.00 |
| Lunch | If you have been away from your normal place of work for over 4 hours which covers the period 12noon to 2pm | £8.50 |
| Tea | If you have been away from your normal place of work for over 4 hours which includes the period 3-6pm | £2.50 |
| Evening Meal | If you have been away from your normal place of work for over 4 hours ending after 7pm | £15.00 |

14.4) Attending approved Learning and Development, Meetings or Other Events

If you are training or attending other meeting/events where a time appropriate meal is provided you will not be able to make any claim for subsistence.

14.4) Claiming Subsistence

Any claims for subsistence allowance should be made via Transfare. You will be required to provide receipts for any claims submitted.

15.0) Policy Owner

Human Resources

16.0) Authorisations

SMT: 05 July 2016
SP&R: 15 December 2016
Council: 09 January 2017

17.0) Review

The policy will be reviewed on a four yearly basis, or sooner as necessary, to ensure that it remains up-to-date with legislative changes etc

18.0) EQIA

This Policy has been “screened out” for Equality Impact Assessment. A copy of the equality screening is available from Human Resources.