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1 Introduction

This policy sets out the rules and guidance to be followed in respect of travel undertaken in the course of employment within the Trust.

This policy supports the delivery of goals identified in the Trust's overarching strategic framework, Our Journey to Change, and is underpinned by the values included within. Our Journey to Change wants people to lead their best possible lives, with three specific goals:

1. To co-create a great experience for our patients, carers, and families.
2. To co-create a great experience for our colleagues.
3. To be a great partner.

The Trust's 3 key values, which are underpinned by behaviors that will help us achieve these goals are:

1. Respect
2. Compassion
3. Responsibility

This policy will particularly help us to deliver our second strategic goal "to co-create a great experience for our colleagues" by providing clear guidance for colleagues to ensure that they are well-informed and supported when needing to travel in the course of work. It also supports colleagues to understand requirements to access lease car arrangements, and ensures colleagues are reimbursed fairly and equitably for expenses incurred whilst working for the Trust.

2 Why we need this policy

2.1 Purpose

This policy sets out the rules and guidance to be followed in respect of travel undertaken in the course of employment.

3 Scope

3.1 Who this policy applies to

This policy applies to all Trust Staff including the Directors of the Trust whose remuneration and lease car scheme is determined by the Pay and Workforce Group.

This policy applies to all other staff that are required to travel to undertake their work. In practice some of the conditions are not applicable equally to all types of staff and this is highlighted where appropriate. However, all staff should comply with the general principles of this policy.

4 Policy

4.1 Reimbursing Claims

The Trust will reimburse all reasonable expenses incurred during the course of normal business travel. Business travel is considered to be all travel undertaken during the course of the working day but excluding normal commuting.

The Trust does not charge staff for parking at any of its bases. Where staff are required to purchase a ticket to park at their base, this can be reimbursed via an expenses claim form.

In accordance with best practice, claims should be submitted within no more than three months, preferably monthly with individual line entries for each journey undertaken. Failure to comply with this may result in non-payment of claims.

4.2 Health and Safety at Work

The Health and Safety Executive has issued specific guidance in respect of the management of work-related road safety. The Trust has a duty of care to ensure that all employees undertaking travel in the course of their work are suitably qualified to do so and that their vehicle is appropriate and well maintained. The details of the requirements are set out in the [Driving at Work Policy](#) quoted above.

In order to meet the Trust's Health and Safety duties and minimise risk, drivers and their managers are responsible for ensuring all "key areas of evaluation" included in [Annex E](#) are met as detailed, before any journeys are undertaken.

4.3 Driver Responsibility

Although the Trust will actively manage at work road risks, drivers remain responsible for their own and others safety on the road. Drivers must be aware of their responsibility to drive safely and to comply with Road Traffic Acts and the Highway Code at all times. It is the responsibility of both the driver and manager to ensure they meet all the requirements detailed in [Annex F](#) before undertaking business mileage.

Drivers must not leave Trust equipment in a vehicle overnight.

4.4 Agenda for Change

The Trust abides by the rules of the Agenda for Change Terms and Conditions. These rules deal with the conditions of service of employees in the NHS and are updated from time to time. Sections 17 and 18 of the NHS Terms and Conditions of Service Handbook refer to Mileage Allowances and Subsistence Allowances payable to staff. Extracts of these rules are reproduced as part of this Policy where appropriate.

Agenda for Change is not applicable to Medical Staff, whose terms and conditions are set out in Terms and Conditions - Consultants (England) 2003. The entitlement to mileage allowances is broadly the same as for non-medical staff although alternative rates are payable.

Terms and Conditions for all groups of staff are supplemented by the Trust's policy on Leased Vehicles.

4.5 Public Transport

Wherever appropriate, public transport should be used. Where any employee chooses to use their own vehicle for any journeys where public transport is readily accessible, they shall be paid at Public Transport Rate only unless the needs of the service require them to use their car or a hire car. This should be in the best interest of the Trust i.e. reasonable in that due to the geographical spread of the Trust it may be more practicable for an employee to use their own vehicle and paid at the rate set out in paragraph 1 of [Annex A](#).

In all cases, public transport should be used at the economy tariff. There is no entitlement to travel by first class for any employee unless this proves to be the more economical option.

Corporate Travel Management is a company contracted by the Trust to book all travel and accommodation. Employees who need overnight stay or all non-car transport must book via Corporate Travel Management. Please see [section 8](#) for more details.

5 Lease Car Scheme

The Trust operates a lease car scheme and all employees who are required to travel for the Trust may be eligible to join the scheme. Under the scheme, cars are provided on a contract hire agreement, normally for a period of 3 years. Cars are covered by fully comprehensive insurance, breakdown and recovery services and accident management. Routine servicing, maintenance and repairs are also covered.

Cars may be provided for NHS business and private use or for NHS business use only (Home to work commute journeys are classed as private use). All employees who meet the criteria as detailed below will be offered a lease car for business use. The offer will include the option to use the vehicle for private use. Where the option for private use is taken the driver will have a free choice of car, providing that it meets the vehicle selection criteria. Full details of the lease car scheme are contained in the separate [Lease Car Policy](#).

Employees who are expected to travel more than 3,500 eligible miles per annum will be offered a lease car. This amount is pro rata for part time staff, to calculate eligible mileage use the following formula:

$$3,500 / 37.5 * \text{contracted hours} = \text{eligible miles to be offered a lease car.}$$

All Trust employees can apply for a lease car if they choose to do so, even if they do not meet the above criteria.

Lease Car Allowances are set out in paragraphs 1 to 6 of [Annex B](#).

The Trust's Lease Car Scheme will be administered by Knowles Associates TFM Ltd – telephone 01206 252300. For further information about how the lease car scheme operates please contact Knowles Associates or you can download a question and answer booklet and quotation request form from the lease car website www.nhsfleet.com/tewv.html.

6 Mileage Allowances

6.1 Lease Cars

The Trust may offer lease cars to employees who are required to be mobile and where it is deemed to be in the interest of the service to do so. This is in accordance with Agenda for Change Section 17 (17.2) and Terms and Conditions - Consultants (England) 2003 schedule 21 paragraph 33.

Employees, excluding consultants (see next paragraph); who prefer to use their own car rather than accept the offer of a lease car shall be reimbursed at the reserve rate as detailed in Annex

A for all journeys, unless they have a “reasonable reason for declining a lease car” (Agenda for Change Section 17.17). “Reasonable reasons” are exceptional circumstances, such as they are in receipt of a Motability allowance (individual circumstances to be taken on merit and considered as they arise).

In the case of consultant medical staff employed after 1 April 2003, those who refuse the offer of a lease car shall be reimbursed at the special rate, this being equivalent to the current 9,001 to 15,000 miles rate for over 2,000cc regardless of engine size (25.5p per mile) for all journeys. This is in accordance with: Terms and Conditions - Consultants (England) 2003 schedule 21 paragraph 35

If a member of staff meets the lease car qualifying criteria, but it is not in the interest(s) of the Trust to offer a lease car, all official journeys will be paid at the rate set out in paragraph 1 of Annex A.

6.2 Reserve Rate

This will apply to all journeys undertaken by staff in privately owned vehicles where the journey relates to excess travel, attendance at any course or conference (not including mandatory training / induction) or where the Trust pays the full miles travelled between homes to the work place for planned or emergency returns to base. Reserve Rate also applies to planned daily mileage of 120 miles or over see 6.5 below.

Mandatory Training is to be classified consistently as detailed in the [Staff Development Policy](#) – follow intranet link to view [Mandatory Training Needs Analysis](#). It is both an employee and a manager’s responsibility to ensure that claims are submitted in line with the above training needs specification.

6.3 Standard Rates

[Annex A](#) point 1 shows mileage rates to be applied to all staff on Agenda for Change contracts who undertake official business journeys and who do not meet the criteria for a lease car and reserve rate is not applicable.

Mandatory training and Trust induction will be reimbursed at standard rates.

6.4 Eligible Miles

Employees on Agenda for Change contracts will be reimbursed for miles travelled in the performance of their duties which are in excess of the home to agreed work base return journey. Normally the miles eligible for reimbursement are those travelled from the agreed work base and back. However, when the journey being reimbursed starts at a location other than

the agreed work base, (for example home), the mileage reimbursed will be as set out in the example below (source: Agenda for change handbook section 17):

Journey (Outward)	Distance	Eligible Miles
Home to base	15 miles	None
Home to first call	Less than 15 miles	Eligible mileage starts after 15 miles have been travelled
Home to first call	More than 15 miles	Eligible mileage starts from home, less 15 miles

Journey (return)	Distance	Eligible Miles
Last call to base		Eligible mileage ends at base
Last call to home	Less than 15 miles	Eligible mileage ends 15 miles from home
Last call to home	More than 15 miles	Eligible mileage ends 15 miles from home

The eligible mileage criteria are also applicable to lease car users from the date of ratification of this policy. The annual mileage estimates submitted when collecting quotes for a lease car should reflect this, otherwise the employee will be liable for an end of year adjustment charge

Any lease car contracts agreed or in place at the date of ratification of this policy will be protected from the introduction of eligible mileage, however all new quotes (including renewals) need to account for the deduction of home to base mileage if base is not touched on any day.

6.5 Hire Cars

Hire cars will be made available to all staff using their own vehicles where they plan to exceed 120 eligible miles on any one day. Hire cars will be procured by the Trust's fleet administrators (Knowles Associates TFM Ltd – telephone 01206 252300) and can be delivered to site, home or base as required.

Where an employee chooses not to make use of a hire car, this will result in all travel for that day being paid at the reserve rate. The payroll department will automatically process all claims of 120 miles and over at the reserve rate (as detailed in [Annex A](#)) for the total miles claimed on that particular day.

There may be exceptional circumstances where the use of a lease car is not possible. In these instances the standard rate will be paid (at manager's discretion).

This does not apply to consultant medical staff.

6.6 Passenger Allowances

Where employees are conveyed in the same vehicle, the driver will be entitled to claim the rate per passenger disclosed in Annex A provided that passenger would otherwise have been entitled to make an expense claim for their journey.

Passenger allowances do not apply to leased vehicles or employees not on agenda for change contracts.

6.7 Quarterly Assessment of Entitlement

Reviews of travel payments will be undertaken by the Finance Department quarterly each year to determine entitlement to standard or reserve rates and for those employees in receipt of protected rights.

Staff who are expected to travel in excess of 3,500 business miles will be offered a lease car in accordance with 6.1 above, provided that this is expected to be a continuous pattern and is not due to short term circumstances. In such circumstances, staff may remain on standard user allowances.

For the purposes of assessment, any periods spent absent from work due to long term sickness or maternity leave shall be disregarded.

6.8 Home to Base Travel

There is no entitlement in general to claim for home to base travel, except in the circumstances set out in the paragraphs below.

Consultant and Associate Specialist medical staff may claim mileage allowance for one return journey from home to base, up to a maximum of 10 miles in each direction, on days when they subsequently use their car for an official journey. Locum consultants can claim either up to 10 miles in each direction, OR mileage in excess of 10 miles in each direction, whichever is the better, also in line with the Terms and Conditions – Consultants (England) 2003 Schedule 21 para 10.

Consultants with commitments under the same contract to visit more than one place of work which includes a liability to make emergency visits to subsidiary hospitals, other institutions, or domiciliary visits, may, if the employing organisation decides that their liability is so extensive as to make it desirable that their car should always be available at their principal place of work, claim mileage allowances for normal daily journeys between their home and principal place of work up to a maximum of ten miles in each direction. These journeys are treated as private journeys by HMRC and are subject to tax at source.

Employees who are required to return to, or to attend, their place of employment outside their normal hours of duty (additional hours and on-call). This will be in circumstances where they would be entitled to overtime or time off in lieu. In these circumstances any expenses in excess of the expenses they incur as a result of their normal attendance at work and which are actually and necessarily incurred in travelling to and from home shall be reimbursed. Such travel will be paid at the reserve rate for agenda for change staff, and as detailed in Terms and Conditions - Consultants (England) 2003 for medical staff; these journeys are treated as private journeys by HMRC and are subject to tax at source.

Any additional attendance to the normal attendance will qualify; for example if the employee is part-time and works an extra day, or if an employee works five days and attends an extra day they will qualify. If it is necessary for the employee to go home (for domestic reasons) and then return on the same day they will also qualify. However, if an employee is already at work and completes their normal hours then simply working longer will not qualify. This is because they did not incur any additional travelling expense.

All work on the bank does not incur reimbursement for travel expenses, regardless of whether the worker has a substantive post or not.

6.9 Excess Mileage for Private Cars

Employees who are required to change their place of work due to organisational change or their acceptance of another post as an alternative to redundancy may be reimbursed their extra daily travelling expenses (including parking etc.). If the employee does not move they may claim expenses for a period of four years from the date of transfer or for a maximum of two years whilst they are actively seeking a new home.

Employees can choose whether they receive a monthly payment upon the submission of a mileage return, or a lump sum of 70% of 2 years' estimated payments.

The excess mileage is the additional distance travelled between the employee's home and their old base and the employee's home and their new base multiplied by the number of journeys travelled and calculated at the reserve rate; these journeys are treated as private journeys by HMRC and are subject to tax and class 1 national insurance at source.

Excess mileage will not be paid to drivers of lease cars, see 6.10 "Disturbance Allowance"

When recording eligible business miles on a travel expense claim form all staff members **in receipt of EXCESS MILEAGE PAYMENTS** should include their protected home to base miles (their "old" home to base miles) **IF THEY DO NOT TOUCH BASE THAT DAY**, and this will ensure the reimbursement mileage is calculated correctly.

If they **DO TOUCH BASE THAT DAY** employees should use their “new” home to base miles. An example of this is below:

Travel not touching base (for employees claiming excess mileage following relocation only)

Protected (old) home to base (HTB) miles (return journey) = 20 miles

New home to base miles (return journey) = 60 miles

Journey:

Home to Workplace 1 6 miles

Workplace 1 to Workplace 2 8 miles

Workplace 2 to Home 14 miles

Total miles travelled that day 28 miles

Eligible mileage using new HTB 0 miles

Eligible mileage using protected (old) HTB 8 miles ✓

Travel touching base (for employees claiming excess mileage following relocation only)

New home to base miles (return journey) = 60 miles

Journey:

Home to Workplace 1 6 miles

Workplace 1 to Base 24 miles

Base to Workplace 2 12 miles

Workplace 2 to Home 26 miles

Total miles travelled that day 68 miles

Eligible mileage 8 miles ✓

6.10 Disturbance Allowance

Lease car drivers who are required to change their place of work due to organisational change or their acceptance of another post as an alternative to redundancy may be paid a ‘disturbance allowance’. If the employee does not move they may claim the allowance for a period of up to four years from the date of transfer or for a maximum of two years whilst they are actively seeking a new home.

The 'disturbance allowance' is determined by reference to the disturbance factor resulting from the additional travel to the new workplace: In this respect we must calculate the time taken to travel from home to the original workplace and from home to the new workplace. It is then necessary to establish the frequency of journeys undertaken. A reasonable time for the journey should take into account type of roads travelled, speed limits and traffic conditions.

The Disturbance Allowance will be paid through salary and subject to income tax and a class 1 national insurance at source.

The number of one-way journeys undertaken in the month must be logged on the travel and expenses claim form and agreed by line managers.

In cases where an employee has two workplaces (split site) it will be necessary to determine their extra mileage travelled (between home and the second workplace) based on the frequency that site is visited.

However, travel between the two workplaces is travel in the performance of the employee's duty and will be treated as a business journey by HMRC so relief is available for the full cost of travel.

The principle is the same as for employees who have permanently changed their workplace (and qualify for excess mileage) but for less days.

Employees, whose employment requires regular attendance at more than one workplace, may have more than one 'permanent' workplace during the same period. These employees are not entitled to relief for the cost of travel from home to any of the sites. This is because they travel regularly to each site and their work is neither of limited duration nor for a temporary purpose.

The test to determine if a workplace is a second permanent workplace is:

- The employee performs a significant part of their duties there
- People would expect to be able to contact the employee at the second location
- The employee has an office, or desk, and support services at the second workplace which he or she regularly uses

Employees with two work bases must treat their journey from home to each base as private travel. Therefore, if an employee is paid a mileage allowance for using their private car the allowance will be taxed on the full amount.

Lease car drivers may only claim home to base journeys under paragraph 6.8 above.

Business journeys commencing or ending at home will be treated as follows:

Employees that have a designated permanent workplace

Employees will be reimbursed for eligible miles (section 6.4) travelled in the performance of their duties.

Employees who claim excess travel (private cars only) and who visit a temporary workplace will record their journey as above to calculate their business mileage; though must use their “protected” home to base in the calculation. Excess mileage from home to base will be paid at the reserve rate;

Protected (original) home to base excess mileage	15
Distance from home to temporary workplace	12
Distance from temporary workplace to base	10

Deduct the home to base mileage from the total journey(12 + 10) -15 = 7 miles

The eligible mileage claimed will be 7 miles and the excess mileage will be 15 miles.

Employees that have no permanent workplace and work in a geographic area

Employees who are designated ‘geographically based’ for mileage purposes shall be paid the appropriate rate for all journeys by the most direct route from their home to all places necessarily visited on duty and back to their home within the geographic location.

If the employee lives outside the Geographic area the journey from home to the geographic area will be a private journey and the full return distance travelled to the area will be deducted from the total journey when calculating the eligible mileage.

Income tax will be charged on the full amount that the mileage allowance, paid for business journeys, exceeds the HMRC Approved Mileage Rate. Income Tax will be charged on the full amount of the allowance where the journey is classed by HMRC as ordinary commuting. These journeys will include excess travel, training and induction courses and any journeys where the employee returns to work outside normal working hours.

6.11 Transporting Equipment

Employees who use their vehicles in the performance of their duties may be required to take equipment with them, some of which could be classified as heavy or bulky. A full risk assessment must be carried out before this is permitted. An allowance (see [Annex A](#)) shall be paid for all eligible miles for which the equipment is carried, provided that either:

- The equipment exceeds a weight which could reasonably be carried by hand; or
- The equipment cannot be carried in the boot of the vehicle and is so bulky as to reduce the seating capacity of the vehicle.

7 Subsistence Allowance

7.1 Overview

The Trust currently reimburses staff in accordance with Agenda for Change Section 18 and Terms and Conditions / Consultants (England) 2003 schedule 21.

The purpose of this section is to reimburse staff for the necessary extra costs of meals, accommodation and travel arising as a result of official duties away from home. Business expenses which may arise, such as official telephone calls, may be reimbursed with certificated proof of expenditure.

7.2 Night subsistence

7.2.1 Short overnight stays in hotels, guesthouses and commercial accommodation

All accommodation must be booked in advance through Corporate Travel Management ([Annex D](#)).

Employees are able to claim a meal allowance, to cover the cost of a main evening meal and one other day-time meal, at the rate set out in [Annex C](#) through an expenses form.

7.2.2 Short overnight stays in non-commercial accommodation

Where an employee stays for short overnight periods with friends or relatives or in a caravan or other non-commercial accommodation, the flat rate sum set out in paragraph 3 of [Annex C](#) is payable. This includes an allowance for meals. No receipts will be required.

Employees staying in accommodation provided by the employer or host organisation shall be entitled to an allowance to cover meals which are not provided free of charge, up to the total set out in paragraph 2 of [Annex C](#).

Where accommodation and meals are provided without charge to employees, e.g. on residential training courses, an incidental expenses allowance at the rate set out in paragraph 6 of [Annex C](#) will be payable. All payments of this allowance are subject to the deductions of appropriate tax and National Insurance contributions via the payroll system.

7.2.3 Short-term temporary absence travel costs

Travel costs between the hotel and temporary place of work will be separately reimbursed on an actual cost basis.

7.2.4 Long-term overnight stays

After the first 30 nights' stay in the same location the entitlement to night subsistence shall be reduced to the maximum rates set out in paragraph 4 of [Annex C](#). Meals allowances are not payable to these employees. Those who continue to stay in non-commercial accommodation will continue to be entitled to the rate set out in paragraph 3 of [Annex C](#).

7.3 Day subsistence

A meal allowance is payable when an employee is necessarily absent from home on official business and more than five miles from their base, by the shortest practicable route, on official business. Day meals allowance rates are set out in paragraph 5 of [Annex C](#). These allowances are not paid where meals are provided free at the temporary place of work.

A day meals allowance is payable only when an employee necessarily spends more on a meal/meals than would have been spent at their place of work. An employee shall certify accordingly, on each occasion for which day meals allowance is claimed.

Normally, an employee claiming a lunch meal allowance would be expected to be away from their base for a period of more than five hours and covering the normal lunch time period of 12:00 pm to 2:00 pm. To claim an evening meal allowance an employee would normally be expected to be away from base for more than ten hours and unable to return to base or home before 7:00 pm and as a result of the late return is required to have an evening meal. Employees may qualify for both lunch and evening meal allowance in some circumstances. There will be occasions where, due to the time of departure, there will be the necessity to take a meal but the conditions relating to the time absent from the base are not met. This, and any other exceptions to the rules, may be allowed at the discretion of the employer.

The scope and level of any other payments will be determined by the employer, according to local needs, on a vouched basis.

All meals allowances claimed as night or day subsistence should be supported wherever possible with valid receipts and the Trust will not reimburse for any alcohol purchased under any circumstances.

8 Business Travel and Accommodation

8.1 Trust managed travel service

When booking any type of business travel and / or accommodation the Trust expects that value for money is demonstrated and that the cheapest appropriate option is selected, so from the 1st June 2016 the Trust has used a managed travel service.

The Trust has nominated a team of bookers who are trained and authorised to make booking for business travel and accommodation on behalf of Trust staff. The names and contact details of Corporate Travel Management bookers are available on the TEWV Intranet at [Home > Teams & Services > Finance](#) (Business Travel & Accommodation section).

Staff should not make bookings personally, using either their own or a Trust credit card. Expenses will not be reimbursed via the Travel Expense claim system.

8.2 Rail and Air Travel

If rail or air tickets are required for a business journey then a **Business travel and accommodation booking form** ([Annex D](#)) must be completed by the applicant and authorised by the appropriate budget holder.

Once the **Business travel and accommodation booking form** has been completed and authorised, this must be forwarded to a named Corporate Travel Management booker within the Trust. Please telephone the booker you have selected before sending the booking form, to ensure that they are available to make the booking, especially if it is a short notice booking.

The Corporate Travel Management booker will make rail bookings directly via an online system and confirm all relevant details with the applicant by email. Take this confirmation with you on your journey.

Bookings for air travel will be made by Corporate Travel Management. All bookings will be by economy class. However Corporate Travel Management will book First Class fare if this proves to be the more economic option, including when seats are unavailable or required due to the [Workplace Adjustments Procedure](#).

The Corporate Travel Management Booker will complete the booking confirmation details on the **Business travel and accommodation booking form** and forward this to the Finance Directorate.

The Finance Directorate will reconcile invoices from Corporate Travel Management to completed forms and complete the payment process.

Where possible staff should pick train tickets up from the departure station. Please ensure you have the relevant numbers and ID to collect the tickets.

8.3 Hotel Accommodation

If hotel accommodation is required for a business journey then a Rail / Air / Hotel Accommodation Booking Form ([Annex D](#)) must be completed by the applicant and authorised by the appropriate budget holder.

Once the Rail / Air / Hotel Accommodation Booking Form has been completed and authorised, this must be forwarded to a named Corporate Travel Management booker within the Trust.

The Corporate Travel Management booker will make rail bookings directly via an online system and confirm all relevant details with the applicant by email. Take this confirmation with you on your journey.

The Corporate Travel Management Booker will complete the booking confirmation details on the **Business travel and accommodation booking form** and forward this to the Finance Directorate.

The Finance Directorate will reconcile invoices from Corporate Travel Management to completed forms and complete the payment process.

Hotel bookings will be capped at the following nightly rates for bed and breakfast (including VAT)

- London £150
- Outside London £120

Corporate Travel Management will endeavour to source rooms within these rates wherever possible, but costs may be in excess of capped rates if rooms are scarce or to avoid employees being accommodated at an unreasonable distance from their conference / Seminar / course.

Any booking in excess of the capped rate will need to be authorised by a Director of the Trust.

8.4 Travel Insurance

If travelling abroad on Trust business it is the responsibility of the employee to make sure that they have arranged appropriate medical/travel insurance for that journey. If an employee does not have an annual insurance policy that would cover the journey then a separate policy must be arranged to cover the duration of the Trust business and any costs for this will be recoverable through a normal expenses claim form.

9 Non-Staff Travel Expenses

Travel expense rates are shown in paragraph 3 of [Annex A](#) for non staff groups i.e.:

- Associate Hospital Managers
- Trust Governors
- User Carers
- Volunteers
- Patients Travel

10 Related documents

- [Lease Car Policy](#)
- [Non Business Use Lease Car Procedure](#)
- [Staff Development Policy](#)
- [Workplace Adjustments Procedure.](#)

11 How this policy will be implemented

Policy will be circulated via the Trust wide updates and uploaded to both the TEWV intranet and external website. This is an update to an existing policy used throughout the Trust. Updates as part of version 6 are factual and do not impact on the process for employees.

11.1 Training needs analysis

Staff/Professional Group	Type of Training	Duration	Frequency of Training
All employees	Read the policy	As required	As required

12 How the implementation of this policy will be monitored

Number	Auditable Standard/Key Performance Indicators	Frequency/Method/Person Responsible	Where results and any Associate Action Plan will be reported to, implemented and monitored; (this will usually be via the relevant Governance Group).
1	Expense claims are review prior to payment by the payroll team with the number of errors expected to be zero.	Monthly	N/A – errors escalated to ARC, if material

13 References

Policy based on Agenda for Change
 NHS Terms and Conditions of Service Handbook (Sections 17 and 18)
 Terms and Conditions - Consultants (England) 2003

14 Document control (external)

To be recorded on the policy register by Policy Coordinator

Date of approval	21 June 2023
Next review date	21 June 2026
This document replaces	Travel and Subsistence Policy FIN-0004-v5
This document was approved by	Senior Finance Meeting (virtual approval)
This document was approved	07 June 2023 (virtual)
This document was ratified by	Management Group
This document was ratified	21 June 2023
An equality analysis was completed on this policy on	7 June 2023
Document type	Public
FOI Clause (Private documents only)	n/a

Change record

Version	Date	Amendment details	Status
v6	21 June 2023	Full review with minor changes acknowledging that further changes will be required once Smarter Working is embedded: <ul style="list-style-type: none"> • Updated to new template; • Update to terminology; • Updated to reflect any required legal changes; and • Inclusive language amendments (i.e. “his/her” to “their” as appropriate) 	Ratified

Appendix 1 - Equality Analysis Screening Form

Please note: The Equality Analysis Policy and Equality Analysis Guidance can be found on the policy pages of the intranet

Section 1	Scope
Name of service area/directorate/department	Finance
Title	Travel and Subsistence Policy
Type	Policy
Geographical area covered	Trustwide
Aims and objectives	To communicate the Trust's reimbursement of travel costs
Start date of Equality Analysis Screening	7 June 2023
End date of Equality Analysis Screening	7 June 2023

Section 2	Impacts
Who does the Policy, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan benefit?	All Trust employees
Will the Policy, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan impact negatively on any of the protected characteristic groups?	<ul style="list-style-type: none"> • Race (including Gypsy and Traveller) NO • Disability (includes physical, learning, mental health, sensory and medical disabilities) NO • Sex (Men, women and gender neutral etc.) NO

	<ul style="list-style-type: none"> • Gender reassignment (Transgender and gender identity) NO • Sexual Orientation (Lesbian, Gay, Bisexual and Heterosexual etc.) NO • Age (includes, young people, older people – people of all ages) NO • Religion or Belief (includes faith groups, atheism and philosophical beliefs) NO • Pregnancy and Maternity (includes pregnancy, women who are breastfeeding and women on maternity leave) NO • Marriage and Civil Partnership (includes opposite and same sex couples who are married or civil partners) NO • Armed Forces (includes serving armed forces personnel, reservists, veterans and their families) NO
Describe any negative impacts	
Describe any positive impacts	

Section 3	Research and involvement
What sources of information have you considered? (e.g. legislation, codes of practice, best practice, nice guidelines, CQC reports or feedback etc.)	Legislation, feedback from employees and lease car administrator.
Have you engaged or consulted with service users, carers, staff and other stakeholders including people from the protected groups?	Yes

If you answered Yes above, describe the engagement and involvement that has taken place	JCC members consulted in original policy development. This minor update has been completed by finance only. Future updates to reflect smarter working will include JCC members again.
If you answered No above, describe future plans that you may have to engage and involve people from different groups	

Section 4	Training needs
As part of this equality analysis have any training needs/service needs been identified?	No
Describe any training needs for Trust staff	
Describe any training needs for patients	
Describe any training needs for contractors or other outside agencies	

Check the information you have provided and ensure additional evidence can be provided if asked

Appendix 2 – Approval checklist

	Title of document being reviewed:	Yes / No / Not applicable	Comments
1.	Title		
	Is the title clear and unambiguous?	Yes	
	Is it clear whether the document is a guideline, policy, protocol or standard?	Yes	
2.	Rationale		
	Are reasons for development of the document stated?	Yes	
3.	Development Process		
	Are people involved in the development identified?	Yes	
	Has relevant expertise has been sought/used?	Yes	
	Is there evidence of consultation with stakeholders and users?	Yes	
	Have any related documents or documents that are impacted by this change been identified and updated?	Yes	
4.	Content		
	Is the objective of the document clear?	Yes	
	Is the target population clear and unambiguous?	Yes	
	Are the intended outcomes described?	Yes	
	Are the statements clear and unambiguous?	Yes	
5.	Evidence Base		
	Is the type of evidence to support the document identified explicitly?	Yes	
	Are key references cited?	Yes	

	Title of document being reviewed:	Yes / No / Not applicable	Comments
	Are supporting documents referenced?	Yes	
6.	Training		
	Have training needs been considered?	Yes	
	Are training needs included in the document?	Yes	
7.	Implementation and monitoring		
	Does the document identify how it will be implemented and monitored?	No	No monitoring required, policy is already part of Trust working so no implementation other than publishing update required.
8.	Equality analysis		
	Has an equality analysis been completed for the document?	Yes	
	Have Equality and Diversity reviewed and approved the equality analysis?	Yes	
9.	Approval		
	Does the document identify which committee/group will approve it?	Yes	
10.	Publication		
	Has the policy been reviewed for harm?	Yes	
	Does the document identify whether it is private or public?	Yes	
	If private, does the document identify which clause of the Freedom of Information Act 2000 applies?	n/a	

Appendix 3 – Annexes

Annex A – Private car mileage allowances

1. Standard rates (Agenda for change contracted staff)

Type of Vehicle / Allowance	Up to 3,500 miles	All miles over 3,500	All Miles
Car (all types of fuel)	56p / mile**	20p / mile**	
Motor cycle			28p / mile
Pedal cycle			20p / mile
Passenger Allowance			5p / mile
Reserve Rate			28p / mile
Excess Mileage			28p / mile
Training (mandatory / induction)			56p / mile
Training (non mandatory / induction)			28p / mile
Carrying heavy or bulky equipment			3p / mile

2. Consultants Special Rate 25.5p per mile

3. Non Staff Travel Rates:

Associate Hospital Managers (AHM's):	45p per mile
Trust Governors:	45p per mile
Service User Carers:	45p per mile
Volunteers:	27p per mile
Patients Travel*:	15p per mile

* Guidance on Patients Travel eligibility is available on the following guidance note: [Healthcare Travel Costs Scheme \(HTCS\)](#)

** At the date of the policy being approved the HMRC tax free travel reimbursement rate is as follows:

	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
Cars and vans	45p / mile	25p / mile
Motor cycles	24p / mile	24p / mile
Bicycles	20p / mile	20p / mile

Mileage reimbursements are taxed at source, meaning the tax implications of paying standard rate (as 56p / mile is higher than the tax free rate of 45p / mile) are dealt with by the payroll department.

Employees may also be entitled to recover income tax if their mileage reimbursement is lower than the HMRC rate, for example if all miles are paid at the reserve rate. The link below to HMRCs website explains how to calculate and claim this:

<http://www.hmrc.gov.uk/incometax/relief-mileage.htm>

Annex B – Lease car mileage allowances

1. Lease Car Scheme Allowance

Annual Mileage Lump Sum Threshold	2,500 miles
Lump Sum payable above the threshold	£1,400
If business miles greater than 2,500 and less than 7,000	15p per mile
If business miles greater than 7,000 and less than 9,000	20p per mile
If business miles is 9,000 per annum or more	25p per mile
Mileage Rate below the threshold	60p per mile

N.B. The mileage rate will apply to all miles from 0

Fuel Reimbursement Rate (inclusive within above allowances but to be reimbursed following submission of a monthly mileage return) 14p per mile

N.B. All reference to % charges below is based on the percentage of the prevailing insurance premium.

2. Environmental Enhancements Fuel Efficiency Rating

CO2 Value between 0 and 100	A - 20%
CO2 Value between 101 and 120	B - 10%
CO2 Value between 121 and 150	C - 5%
CO2 Value between 151 and 165	D - 0%
CO2 Value between 166 and 185	E +10%
CO2 Value between 186 and 225	F +20%
CO2 Value over 225	G +50%

3. Risk Reduction Enhancements

	Per Driver
Additional Drivers (not main driver or partner)	£20.00
Young and inexperienced drivers	£50.00
For each year of age between 17 & 25	£10.00

Private Mileage

Below 5,000 miles	- 5%
5,000 – 7,999 miles	0%

8001 – 12000 miles	2.5%
For each additional 2,000 miles over 12,000	2.5%
No Claims during the year	- 5%
For each claim	+5%

4. Policy Excess

The first private fault claim	Standard Excess
For each additional private fault claim	Standard Excess + £50.00
For additional business fault claim	£50.00

5. Penalty Points

0 penalty points	0%
3 penalty points	5%
6 penalty points	10%
9 penalty points	15%

6. Commuting Enhancements

Excess Mileage	20p per mile
Approved Commuting	20p per mile
Full-time Training Courses	20p per mile
Short term or day release courses	15p per mile
Returns to work (e.g. approved overtime or following an emergency call-out)	20p per mile

N.B. Fuel reimbursement is included in all commuting enhancements for lease cars.

Annex C – Subsistence rates

(As per agenda for change terms and conditions Section 18)

Schedule of recommended allowances

1. Night Allowances: first 30 nights (emergency only)

Actual receipted cost of bed and breakfast (inclusive of VAT) up to a maximum of:

- London £150
- Outside London £120

2. Meals Allowance

Per 24 hour period: £20.00

3. Night allowances in non-commercial accommodation

Per 24 hour period: £25.00

4. Night Allowances: after first 30 nights

Married employees and employees with responsibilities equivalent to those of married employees

Maximum amount payable: £35.00

Employees without responsibilities equivalent to those of married employees and those staying in non-commercial accommodation

Maximum amount payable: £25.00

5. Day Meals Subsistence Allowances

Lunch Allowance (more than five hours away from base, including the lunchtime period between 12:00 pm to 2:00 pm) £5.00

Evening Meal Allowance (more than ten hours away from base and return after 7:00 pm) £15.00

6. Incidental Expenses Allowance

Per 24 hour period: £4.20

Annex D – Business travel and accommodation booking form

[\(link\)](#)

Personal details	
Name of applicant	Title
	Surname
	First Name
Locality	
Position held	
Contact details (Email and telephone number)	Email
	Telephone
Rail travel details	
Travelling FROM	
Travelling TO	
Date of outward journey	
Approximate time of departure	
What time do you need to arrive at your destination BY?	
Date of return journey	
Approximate time of return	
Tube tickets to be included (London only)	YES/NO
Tube Tickets - London Zone (if know)	
Air travel details	
Travelling FROM	
Travelling TO	
Date of outward journey	
Approximate time of departure	
Date of inward journey	
Approximate time of return	
Do you have a railcard? if so which type?	
<i>(Please remember to take your railcard with you as if you fail to take it you will be asked by guard to upgrade ticket paying the guard direct)</i>	
Hotel accommodation details	
Date(s) accommodation required	
<i>(Bed and Breakfast Only as per Trust Policy)</i>	
Please indicate (✓)if breakfast is NOT required	
Address/post code of event/meeting being attended	
<i>(This is to ensure that accommodation is booked close to where attendance is required)</i>	
Authorisation	
Applicants signature	
Oracle Cost centre (6 digit number) *	

Authorised by	
Authorised signatory number * (AS plus either 3 or 4 numerical digits)	

Method of ticket delivery: (delete as appropriate) ticket delivery/ticket on departure
 If you have selected ticket delivery; please indicate the address to which the tickets should be sent

Name	
Address Line 1	
Address Line 2	
Town	
County	
Postcode	

* If you have any queries regarding either oracle cost centre number or authorised signatory number, please contact your locality financial representative or central financial management on 01642 451754.

This form must now be forwarded to an authorised trust booker to arrange travel/accommodation for you. A list of these can be found on the Trust intranet at [Home > Teams & Services > Finance](#)

You can return the form by post or email.

If the form is not completed and authorised properly before being submitted, it will be returned to you and the booking will be delayed.

For booking office use only

Booking Confirmation

Travel/accommodation booked and confirmed with Corporate Travel Management
 YES/NO

Booking reference number

Booked by (Block capitals only)

This form must now be forwarded by Email only to:

Central Financial Management team, Finance Directorate, Flatts Lane Centre

- Email address: tewv.centralfm@nhs.net

External Meeting Venue booking form ([link](#))

Booking details	
Lead name for booking	Title
	Surname
	First Name
Locality	
Position held	
Contact details (Email and telephone number)	Email
	Telephone
Event details	
Title of Event	
Date of event	
Purpose of the event	
Length of event (i.e ½ day or full day)	
Anticipated start time	
Anticipated finish time	
Number of expected delegates	
Disability Access Required?	
Location	
Which Town/city do you want to have the meeting in?	
What search radius are you prepared to consider	Miles
Preferred Venue (If known)	
Facilities	
Please list any additional items i.e. projectors/PA system/video conferencing etc. that you may require	1
	2
	3
	4
Room layout	
Please indicate which room layout you require: ✓	
Lecture theatre	
Boardroom	
Classroom	
Cabaret	
U-shape	
Other (please state)	
Breakout/syndicate rooms	Yes/No
How many rooms required	
Length of time required	
Number of people to be accommodated	

Hospitality	
Tea/coffee	Yes/No
How many servings of above?	
Please state the time they are required	
<ul style="list-style-type: none"> • On arrival • Mid morning • Afternoon 	
Lunch	Yes/No
How many servings of above?	
Please state the time lunch is required	
Please indicate any special dietary requirements if known	
Authorisation	
Applicants signature	
Oracle Cost centre (6 digit number) *	
Authorised by	
Authorised signatory number * (AS plus either 3 or 4 numerical digits)	

* If you have any queries regarding either oracle cost centre number or authorised signatory number, please contact your locality financial representative or central financial management on 01642 451754.

This form must now be forwarded to an authorised trust booker to arrange travel/accommodation for you. A list of these can be found on the Trust intranet at [Intranet > teams and services > Finance](#) (Business Travel and Accommodation).

You can return the form by post or email.

If the form is not completed and authorised properly before being submitted, it will be returned to you and the booking will be delayed.

For booking office use only

Booking Confirmation

Event booked and confirmed with Corporate Travel Management YES/NO

Booking reference number

Booked by (Block capitals only)

Once the 5 day pre event confirmation has been received, please forward a copy of the confirmation Email to:

Central Financial Management team, Finance Directorate, Flatts Lane Centre

- Email address: tewv.centrfm@nhs.net

Annex E – Definitions and guidance notes

Definitions

Geographically based

Base

Permanent Work Place

Temporary Workplace

Managers Guidance Notes

What does geographically based mean?

The Test

Summary

Human Resources Guidance Notes

Driver's Guidance Notes for Private Car Insurance

DEFINITIONS

Vehicle definitions

Lease Car

A lease car is a vehicle that is provided under a contract hire agreement by a leasing company and is predominantly used for business and private use. However, a lease car can also be provided for business use only where it is more cost effective to do so.

Greyfleet Car

Is a vehicle that is owned by the employee, or the employee is the registered keeper, and is used at work for business journeys. The driver receives reimbursement for the business mileage in accordance with Agenda for Change travelling expenses.

Pool Car

Whereas a vehicle used for business use only would normally be allocated to one person for their exclusive use, a pool car is allocated to a department or group of staff for use by more than one driver. A pool car cannot be used for any private journeys and is kept at a business location when not in use.

Hire Car

Hire cars are provided by a daily rental company for short term use and normally for a specific purpose. Periods of hire would not normally exceed 28 days.

Geographically based

The geographic rule can apply to a community based employee whose base can be considered a temporary work place, because their visits to base are infrequent and for a limited duration and the employee has no permanent desk there.

The ruling will also require the job title and employment contract to detail the area the employee will cover.

Base

A base is where an employee may be attached or report to, or where their correspondence is normally sent. It may not be a permanent workplace and it may not be where the employee's line manager has a permanent work base

Permanent Work Place

A work place is considered permanent if the attendance is frequent, follows a pattern, or it is the place the employee usually attends for all or almost all of the period for which he or she holds or is likely to hold that employment. The proportion of an employee's working time spent at a particular workplace is a factor in determining whether or not it is treated as a permanent workplace (for HMRC this is 40%).

* EIM32065 - Travel expenses: travel for necessary attendance: definitions: permanent workplace

Section 339(2) ITEPA 2003

A place at which an employee works is a permanent workplace if he or she attends it **regularly** for the performance of the duties of the employment. It is usually clear whether or not a place is an employee's permanent workplace (and, therefore, whether a journey to that place is ordinary commuting). It is possible for an employee to have more than one permanent workplace at the same time.

Temporary Workplace

A place is a temporary workplace if an employee goes there only to perform a task of limited duration or for a temporary purpose. Even where an employee attends a workplace regularly, it will be a temporary workplace if the employee attends for the purpose of performing a task of limited duration or other temporary purpose.

The test is whether the employee has spent, or is likely to spend, 40%* or more of their working time at that particular workplace over a period of more than 24 months.

Where that is the case the workplace is a permanent workplace and the geographical rule cannot apply.

* EIM32080 - Travel expenses: travel for necessary attendance: definitions: temporary workplace: limited duration, the 24 month rule paragraph 3

Eligible Mileage

Employees will be reimbursed for all eligible miles travelled. They are miles travelled in the performing their duties which are in excess of the home to agreed work base return journey.

Normally the miles eligible for reimbursement are those travelled from the agreed work base and back. However, when the journey being reimbursed starts at a location other than the agreed work base, (for example home), the mileage reimbursed will be as set out in the example in section 4.30.

MANAGERS' GUIDANCE NOTES

What does geographically based mean?

Being geographically based allows employees to have an area treated as their permanent workplace, in these cases the whole of the geographical area is the workplace.

If they live inside that area all journeys between home and any place they visit in the performance of the duties of their employment can be claimed as business mileage. If they live outside the area the journey between home and the edge of the geographical area is ordinary commuting.

The occasional performance of duties outside that area will not prevent the area from being a permanent workplace.

An employee classed as geographically based is entitled to claim for:

- The full cost of business travel made within the geographical area, and
- The full cost of business travel to other workplaces outside the area.

To meet the criteria for Geographic status the employee must:

1. Have no single site that is their permanent workplace, and
2. Their duties of employment are defined by reference to a geographical area

Test

Q1 Does the employee have a permanent workplace?

An employee with a permanent workplace cannot be considered geographically based.

Q2 Is the employee's role defined by a geographical area?

Some employees do not have a single site as a permanent workplace but they have a job where their duties are defined by reference to a particular geographical area. For these employees the geographical area is their permanent workplace. In each case the test will be whether the employee's duties are defined by reference to a particular geographical area.

Q3 Could the employee's job title and contract of employment include a geographic area?

An employee whose contract of employment or job title/specification does not refer to a specific geographical area for the performance of their duties cannot be geographically based. For example the employee may be a CPN for Peterlee and Horden.

Summary

It is important to remember that an employee will have a geographical area as their permanent workplace only where all the following conditions are met

- The employee has no single site that is their permanent workplace, and
- The employee attends the area regularly, and
- The employee has a job where the duties are defined by reference to a geographical area.

HUMAN RESOURCES GUIDANCE NOTES

1. All employees that are required to undertake business mileage in the course of their work must be identified.
2. In conjunction with line managers the requirement for business mileage must be recorded on the employee's job specification. In addition, line managers must identify

whether equipment or people will need to be transported in the car. Hazardous equipment could include gas cylinders, specimens, blood or clinical waste etc.

3. The line manager must identify if;
 - a) The position will attract the offer of a lease car (see lease car policy)
 - b) The post is classed as geographically based
 - c) It will be necessary to make regular journeys that start from home
 - d) If the employee will be on-call
 - e) The driver has more than one permanent workplace e.g. work at split sites
4. This information must be communicated to current and new employees so that they clearly understand the transport requirement and that all new employees should request quotations for a lease car prior to starting work.
5. Once the offer of a new job is made and the employee chooses to use their own car for work they must register their car and document details and obtain approval for the use of their chosen car.
6. Employees should be provided with access to a copy of the Health and Safety policy, the Driving at Work Policy and Drivers Handbook. They must also be provided with access to a copy of the Highway Code.
7. All of these documents are available to view on TEWV intranet.
8. Employees should be advised of the registration procedure below

DRIVER'S GUIDANCE NOTES FOR PRIVATE CAR INSURANCE

What to look for on the insurance certificate?

The definition for 'limitations as to use' must contain reference to employer's business or employment as per examples below:

1. Use for social, domestic and pleasure purposes and use by the policy holder for their business or employment excluding commercial travelling
2. Use for social domestic and pleasure purposes. Use by the policy holder in person in connection with the policy holder's business and/or that of the policy holder's employer
3. Use for social, domestic and pleasure purposes and use by the policy holder in connection with their personal business and use by the policy holder in connection with their employment or employer's business

If the terms above in bold do not appear on the certificate or schedule, then you will need to contact your insurer asking them to confirm in writing that this cover applies. You will need to explain to them that you use your privately owned vehicle for your employer's NHS business.

Depending on the underwriter's requirements, the following points may need to be covered in your request, but not limited to this, you should;

- Provide an estimate of the annual business mileage use (you should not underestimate this).
- Advise them that you undertake business mileage on behalf of your employer in return for payment.
- Advise them that the vehicle will be used for visiting patients, transporting patients and family, transporting equipment, responding to emergency calls, selling equipment etc.
- Provide details of any potentially hazardous materials carried in the vehicle e.g. pressurised canisters, entonox or oxygen gas, tools and equipment, specimens/samples and clinical waste etc.

Provided below are examples of wording for 'limitations as to use' that are NOT acceptable:

A. Use for social, domestic and pleasure purposes excluding use by any person for travelling to and from a permanent place of work, business or study.

B. Use for social, domestic and pleasure purposes including travelling to and from a permanent place of business by the policy holder only but excluding use for the purpose of any profession, trade, business or employment.

C. Use for social, domestic and pleasure purposes and by the policy holder only in connection with their business or profession, excluding commercial travelling.

D. Use for social, domestic and pleasure purposes and by any named driver in connection with their business or profession, excluding commercial travelling.

E. It is used for social, domestic and pleasure purposes including travel to and from work, for all named drivers.

Use for social, domestic and pleasure purposes and use by the policy holder in person in connection with the business of the policy holder.

Annex F – Driving at work policy

The Trust has a legal obligation under The Health and Safety at Work Act 1974 to ensure, so far as is reasonably practicable, the health and safety of all employees while at work. It also has a responsibility to ensure that others are not put at risk by any work-related driving activities. The Act states that “a vehicle is a place of work” (whilst it is used at work) it is considered to be and the employer has an absolute duty of care under section 2 to ensure the safety of anyone driving on their behalf.

Under the Management of Health and Safety at Work Regulations 1999, the Trust has a responsibility to manage health and safety effectively. This requires the Trust to carry out an assessment of the risks to the health and safety of its employees, while they are at work, and to other people who may be affected by their work activities. The Regulations require the Trust to periodically review the risk assessment so that it remains appropriate.

Under the Health and Safety at Work Act, employees who drive at work should co-operate with their employer to enable their employer to comply with their Health and Safety duties. In this respect they should take reasonable care of their own health and safety and that of others who might be affected by their actions, and they must comply with Road Traffic Acts and the Highway Code and use equipment provided to them correctly.

Risk assessments for any work-related driving activity should follow the same principles as risk assessments for any other work activity. The failure to properly manage work-related road safety is more likely to endanger other people than a failure to properly manage risks in the workplace. To enable the Trust to meet these requirements it must hold and maintain a register of all employees that travel in the course of their work and details of all vehicles used at work.

The risk assessment must establish whether the driver is competent and that they are properly trained. This requires details of any accidents and sight of driving licences etc. The type and duration of journeys must also be considered and must include visits to areas and terrain that pose a particular risk to the driver and also whether assistance is available should the driver breakdown or have an accident.

The Trust must be satisfied that drivers are sufficiently fit and healthy to drive safely and not put themselves or others at risk. They must meet the eye sight requirements set out in the Highway Code and they must be aware that they should not drive, or undertake other duties, while taking a course of medicine that might impair their judgement.

The Trust must be satisfied that vehicles are fit for the purpose for which they are used, they must be properly maintained and be in a safe and fit condition. It must also ensure that any goods and equipment that are required to be carried can be safely and properly secured. The Trust must be satisfied that drivers' health, and possibly safety, is not being put at risk, e.g. from inappropriate seating position or driving posture.

The Trust must be satisfied that all documentation and insurance cover meets the minimum standards and that they are kept in date.

The Trust must have in place a safety policy and ensure that employees are given relevant information, training and supervision to be safe in their employment. The Trust must have a clear policy and an organisation structure that allows cooperation between departments and staff. It must also have adequate systems to allow the Trust to manage and monitor work-related road safety effectively. The driver must have access to the Health and Safety policy.

Key areas of evaluation

The Trust must be satisfied that their drivers (responsibility of the driver);

- Are competent and capable of doing their work in a way that is safe for them and other people
- Are sufficiently fit and healthy
- Has under taken an eye test within the last two years
- Have access to safety critical information e.g. health and safety policy and the highway code
- Have been suitably trained

The Trust must be satisfied that the vehicle is (responsibility of the driver);

- Fit for the purpose for which it is used
- Suitable for the work undertaken and journey travelled
- Maintained in a safe and fit condition
- Regularly checked for tyres, brakes, steering and lighting etc.
- The vehicle is serviced in accordance with manufacturer's instructions

The Trust must assess whether (responsibility of manager and driver);

- Routes are planned
- Work schedules are realistic
- Sufficient time is allowed to complete journeys safely
- Distances are too excessive
- Account is taken of prevailing weather conditions
- There is a danger to employee in the areas they visit
- Communication equipment is available and working

The Trust must ensure that Documentation is in order, in that (responsibility of manager and driver);

- Insurance expressly covers the employer's business activity and commuting
- Driving licence is current and covers the class of vehicle driven
- The Road Fund Licence is current
- The MOT (if required) is current

Please note that non-compliance with any of these requirements will be dealt with in line with the Trust's disciplinary policy [Link](#)

Environmental Considerations

The Government has issued a Green Transport Plan under which Local Authorities and Public Bodies have a duty to implement an environmentally friendly transport plan.

The NHS has set itself two targets:

- 1) For the emissions we control directly (the NHS Carbon Footprint), we will reach net zero by 2040, with an ambition to reach an 80% reduction by 2028 to 2032;
- 2) For the emissions we can influence (our NHS Carbon Footprint Plus), we will reach net zero by 2045, with an ambition to reach an 80% reduction by 2036 to 2039.

The Trust is committed to reducing CO2 emissions and intends to apply for a gold standard from the Energy Saving Trust; this requires the measurement of the current and future emissions produced by vehicles at work. The carbon footprint is a product of the mileage travelled and the CO2 emission output of the car therefore the register is designed to capture this information.

The sustainable development unit (SDU) is keen that organisations should make use, whenever it is possible or practicable, of low carbon lease vehicles in line with relevant legislation.

Agenda for Change

To comply with section 17 of the Trust has developed a travel policy and a lease car policy. The purpose of the policies is to provide an interpretation of the national rules for local conditions and to provide guidance to line managers. In addition the Trust must also ensure that the application of the allowances and definitions of business journeys comply with the requirements of H.M. Customs and Revenue (HMRC).

Data Protection

To comply with the requirements of the Data Protection Registrar, the Trust needs to ensure that it holds the most accurate records of drivers and their contact information. The Health & Safety at work regulations require the Trust to make available policy details and other relevant information to all employees who drive at work. The Register will enable the Trust to communicate this information successfully.