

GUIDE TO CLAIMING EXCESS TRAVEL EXPENSES- MILEAGE AND PUBLIC TRANSPORT

In accordance with Agenda for Change Section 17.25, if, as a result of organisational change, there is a requirement to move staff from their normal place of work to another location and this results in unavoidable increased travel costs to and from work, staff may be reimbursed their extra daily travelling expenses for a period of 4 years from the date of transfer. You are not eligible if the move has not caused you additional expense (for example if your new office is nearer your home) or if you have voluntarily changed jobs to a new location. We can only reimburse mileage or public transport claims; we cannot (for example) reimburse you for additional childcare costs or parking charges. If you are unsure whether you are eligible to claim then speak to your line manager.

If this is your first change of work base, you need to complete the 'Authorisation to claim excess mileage' form which will then need to be authorised by your line manager. This authorisation shows what the employee is eligible to claim. A copy should be sent to HR for the employee's personal file.

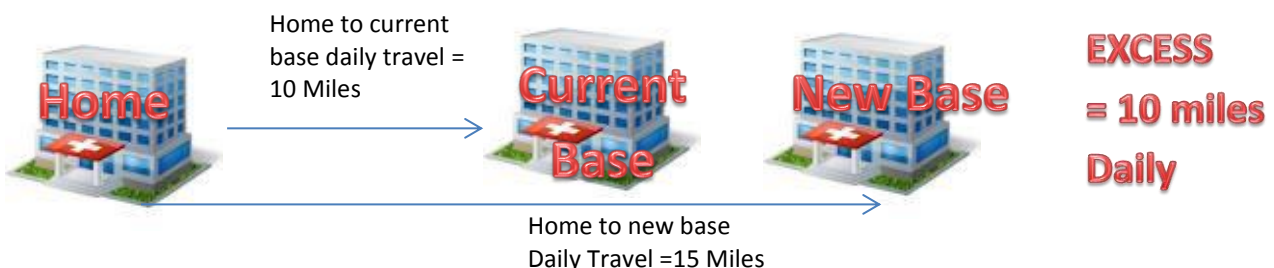
The following example illustrates how you can calculate your daily excess travel. Reimbursement will be made via payroll and can be detailed on the usual NHS Islington CCG Expense Claim form, using the reason for travel as 'daily excess mileage'. Forms must be signed off by your line manager and original receipts/evidence of mileage should be attached. Forms should be submitted to payroll regularly (not more than three months later than the date the claim relates to) and in good time.

Employees may claim for additional miles travelled (if they drive to work) or extra public transport cost (if they use public transport). Car mileage will be reimbursed at the reserve rate of 28p per mile. As the change of base is permanent, any mileage will be liable for tax which will be deducted from pay in line with the HM Revenue & Customs guide to personal Taxable Allowances and Rates www.hmrc.gov.uk

You should always choose the most efficient means of travel, and method of paying for your travel. This may mean, for example, buying a monthly or weekly travel-card rather than buying daily tickets. You should only claim for journeys actually undertaken; for example if you are claiming daily mileage you should not claim for days when you were on annual leave, or not in the office for any other reason.

CALCULATING EXCESS MILEAGE – FIRST CHANGE OF BASE

- The daily travel from home to your current base is 10 miles, you then move to your new base. The daily travel from home to the new base is 15 miles. The excess mileage you can claim in this example would be:
 (Daily mileage to new base = 15 miles) MINUS (daily mileage to old base = 10 miles) = 5 excess miles per journey, per day. You would therefore claim 10 miles allowance in total per day.



- If you drive to work; your new place of work is 5 miles from your home. Your original place of work was 10 miles away from home. In this scenario you would not claim anything because you have not accrued any additional cost.

- If you take public transport to work; your home is in travel Zone 4 and your original place of work was in Zone 2. Your new place of work is in Zone 1. In this scenario you claim for the difference between a Zone 2-4 and a Zone 1-4 ticket.
- You take public transport to work; both your original place of work and your new place of work are both in Zone 1, but your new journey to work takes 20 minutes longer as the new place of work is further away. In this scenario you cannot claim excess travel allowance because although your journey is longer, it does not cost you anything extra.

CALCULATING EXCESS MILEAGE - MORE THAN 1 CHANGE OF BASE

In this scenario, you already claim excess mileage but are required to move again as of 1st October 2015. This may result in increased or reduced daily travel. As a result you may continue to claim until the end of your original 4 year period. A new excess travel protection period will start, but only for the additional miles accrued. You will be required to complete a new authorisation to claim excess mileage form for authorisation by your line manager.

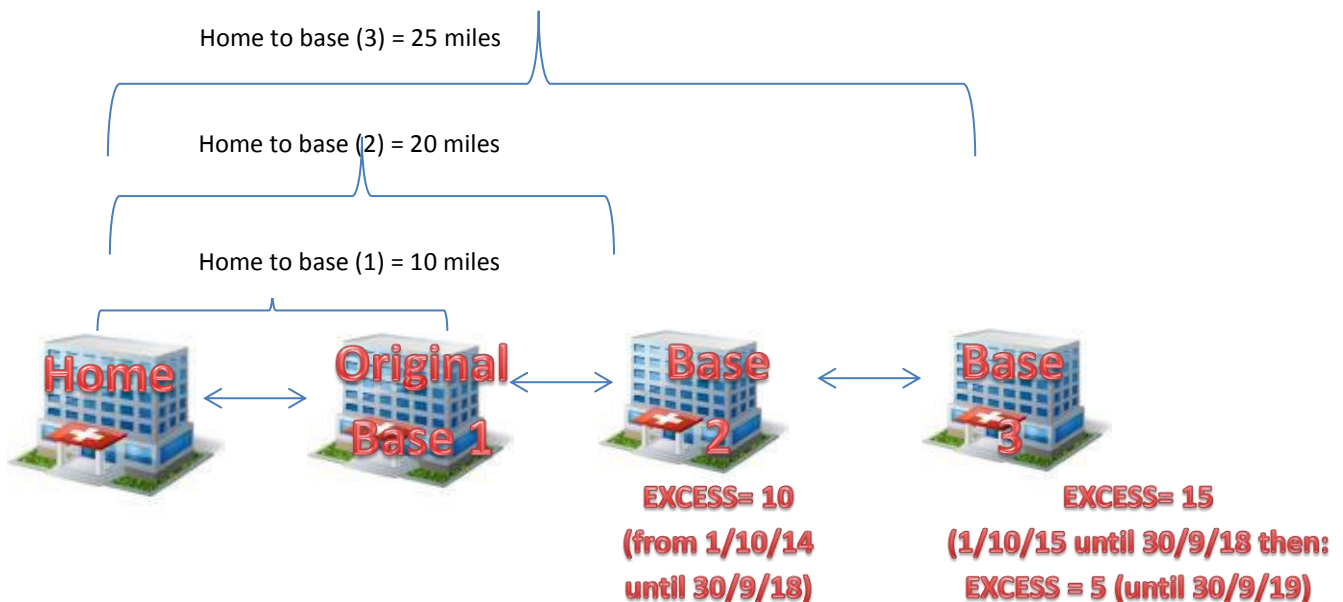
In such circumstances, the calculation of excess travel should be made as per the below example:

SCENARIO 1 – you moved from work base (1) on 1st October 2014 and moved again on 1st October 2015 to work base (2) – both moves result in extra daily travelling.

You are entitled to claim excess travel from the original base (1) to new base (2) for 4 years from 1 October 2014 until 30 September 2018, your home to base (1) was 10 miles, your home to base (2) is 20 miles and your excess for this period of protection is 10 miles.

On 1 October 2015 you are then moved from work base (2) to work base (3). Your daily excess is currently 10 miles; you are now travelling an extra 5 miles to base (3) and this protection will be in place until 30 September 2019.

Based on this example, you are now entitled to claim 15 excess miles daily between base (1) and base (3) from the date of the move to base (3) until the expiry of the original protection following your move to base (2) which will expire on 30 September 2018. You will then only be eligible to claim 5 miles excess between base (2) and base (3) until 30 September 2019.



- October 2014 – September 2015 = 10 miles
- October 2015 – September 2016 = 15 miles
- October 2016 – September 2017 = 15 miles
- October 2017 – September 2018 = 15 miles
- October 2018 – September 2019 = 5 miles
- October 2019 onwards: nothing

SCENARIO 2 - You moved from your original work base (1) on 1st October 2014 to work base (2). Your home to base (1) was 10 miles; your home to base (2) was 20 miles resulting in a daily excess mileage of 10 miles

from 1 October 2014 until 30 September 2018. You moved again to work base (3) on 1st October 2015 however the move to base (3) has brought you closer to your home/original base, your home to base is now only 17 miles. **How will the new excess travel be calculated and for how long?**

If as a result of change of base you move closer to your home / original base, your actual traveling distance will reduce and therefore you will claim reduced excess. This new excess will apply for 4 years from the date of the move, based on this example you would claim 10 miles daily excess from 1 October 2014 that will then reduce to 7 miles daily excess from 1 October 2015 until 30 September 2019.

- October 2014 – September 2015 = 10 miles
- October 2015 – September 2016 = 7 miles
- October 2016 – September 2017 = 7 miles
- October 2017 – September 2018 = 7 miles
- October 2018 – September 2019 = 7 miles
- October 2019 onwards: nothing

SCENARIO 3 – You moved from your original work base (1) to work base (2) on 1 October 2014 and you moved again on 1 October 2015 which will move you closer to home than your original base (or moving back to your original base). How will the new excess travel be calculated and for how long?

You are not eligible to claim excess mileage if your change of work base has not caused you additional expense or if you have voluntarily changed jobs to a new location.

CALCULATING EXCESS MILEAGE – PUBLIC TRANSPORT

The reimbursement is only for the **additional** cost of travel from your old work base to your new work base. Receipts for public transport should be provided on the claim form for your managers' authorisation. If you are using an oyster card, register your Oyster Card online at www.tfl.gov.uk this will allow you to print off a journey history and summary of charges made to the card.

For any questions relating to excess mileage please speak to your HR Business partner.



Islington

Clinical Commissioning Group

AUTHORISATION TO CLAIM EXCESS TRAVEL EXPENSES

“Where there is a compulsory requirement for an employee to change their base of work on a temporary or permanent basis (...), the employee may be reimbursed their extra daily travelling expenses for a period of four years from the date of transfer. Mileage will be reimbursed at the reserve rate or through the submission of receipts, the cost of public transport.” Travel & Expenses Policy Para 3.11

This form is to be completed by the claimant and authorised by their line manager.

Name:	
Job Title	
Department:	
Line Manager:	
Date of move:	
Home Address:	
Method of Transport to Work (e.g. car, public transport)	
Previous base full name and address:	
New Base full name and address:	
Details of Claim: [E.g. difference between Zone 1 and 2 travel card, X number of miles extra travelled per day]	

EXCESS MILEAGE CALCULATION

Daily return mileage from home to present base		
Daily return mileage from home to future base		
Excess miles (difference between present and future return mileage)		

I attend work at present on.....occasions each week and will be attending for work at my new base on.....occasions each week.

I confirm that the above is a true and accurate reflection of the additional expenses incurred as a result of my change in location. I commit to informing my line manager should any of personal circumstances which affect this agreement change (e.g. change in home address)

[Employee to sign]

.....
Name:

.....
Date:

I authorise the payment of excess travel allowance as detailed above to the named employee [Manager to sign]

.....
Name:

.....
Date: