

Frequently asked questions

These are provided for guidance or quick reference guide only, so always refer to the policy

1. Rail Travel

1.1 When can I book rail tickets outside of the normal provisions in the policy?

If the booking of an open ticket is necessary, you should where possible try to buy two single tickets - one fixed and one open return journey.

Where the employee has a disability that cannot be accommodated in standard class, first class rail travel is allowed.

There may be other rare occasions when it is appropriate to agree first class rail travel. This will only be appropriate when all of the following conditions are met:-

- It is clear that the employee has work which can be done effectively during the journey

And

- That reasons exist why it would not be appropriate to undertake this work in standard class

And

- That the journey (one way) is more than 90 minutes duration

First Class travel can also be booked where the cost of travel is CHEAPER/LOWER than the standard fare.

Ensure that you check restrictions and cancellation policy to limit any additional costs being added. Access to First Class travel must be approved by your manager and requested via Procurement. These options are then visible in the search view.

1.2 What should I do if my plans change and I no longer need my rail tickets?

Tickets are normally collected from the Ticket Machine prior to travel. Should you be unable to travel, and do not collect the tickets, the tickets will be automatically refunded. In any other circumstances, details can be accessed through our travel provider's portal.

1.3 When can I claim the cost of discount travel cards?

We will reimburse the cost of discount travel cards, season tickets and annual rail cards (e.g. Senior Rail Card; Disabled Person's Rail Card or 16-25 Rail Card), for regular business travel where a business cost benefit can be demonstrated. These are subject to tax and National Insurance deductions. 2together railcards will not be reimbursed.

1.4 How do I claim payment for journeys using Carnets and Oyster cards?

The expense claim is retrospective to the travel and must be supported by the supplier itemised journey summary, with business journey specifically itemised. No prepayment and/or top-ups of Carnets and Oyster cards may be claimed.

2. Air Travel and Overseas Travel

2.1 How can I book flights?

Appropriately approved flights can be booked direct with our travel provider. Contact Procurement to arrange this.

2.2 When can I book air travel outside of the normal provisions in the policy?

All air travel should be economy class. In cases where a disability cannot be accommodated in economy class or the flight exceeds 5 hours flying time and you are expected to work during the flight and imminently on arrival, discretion may be exercised by the Chief Executive to support a case for business class travel (or equivalent) made by your Director. First class flights will not be approved in any circumstance.

2.3 What should I consider when travelling within Europe?

You must ensure that you apply for and take with you your valid Global Health Insurance Card ([GHIC](#)) when travelling on business overseas

NHSBT provides insurance cover for emergency medical and dental treatment costs incurred by employees whilst overseas on NHSBT business. Contact HR Direct on 0117 921 7700 (27700).

Employees travelling overseas should familiarise themselves with the insurance details prior to travelling, which are available from HR Direct.

It is important that you ensure that you have travel insurance to cover other non-health related matters.

2.4 How do I claim the expenses I incur during overseas travel?

Expenses should be converted to sterling for reimbursement. You will need to provide evidence of the exchange rate at the time e.g. cash exchange statement or credit card conversion.

We will reimburse reasonable costs/commission incurred.

3. Road Travel

3.1 How do I reclaim mileage?

Journeys you travel on business should be recorded in our expenses system. Eligible business mileage will be calculated in line with NHS Terms and conditions.

The expenses system will automatically calculate eligible business miles based on the postcodes entered for the start and end locations for each journey step.

Mileage will be reimbursed at the appropriate 'grey' or lease car rate.

3.2 What car insurance do I need?

If you have a lease car, you will be covered by the insurance arranged for you through the lease car agreement for your vehicle.

If you are driving your own car, this must be registered under grey fleet. To do this you will need cover for business use under your own insurance.

In all cases you are advised to ensure that all personal effects carried on business journeys are covered by your own insurance.

3.3 Can I claim travel when recalled to work and, if so, how?

If you are required to attend or return to your place of work outside your normal hours of duty e.g. on-call or in circumstances for which you may claim overtime or time off in lieu, you are entitled to claim ('recall to work') travel expenses. This includes if you are required to work on a public holiday. Such mileage does not count as business mileage and therefore you do not need to be on the 'grey fleet' register to claim this. The expenses system does allow this. Should you have difficulty with this, contact HR Direct on (2)7700 or at HRDirect@nhsbt.nhs.uk.

You will be reimbursed your home to your base journey. Mileage in your own car will be reimbursed at the normal business rate and is subject to income tax and national insurance.

Lease car drivers claiming reimbursement of fuel costs/mileage relating to any home to base mileage (travelled for whatever reason) should be aware that such mileage reimbursement is classified by HMRC as 'private mileage'.

Claiming this will therefore incur a 'fuel scale benefit charge'. This is a tax charge on the benefit of free fuel provided for private motoring in a company (lease) car and is linked to carbon dioxide (CO2) emissions. The same percentage figure used to calculate the company car benefit charge is used to arrive at the fuel scale charge, based on the company (lease) car's approved CO2 emissions with supplements for diesel cars and discounts for alternatively fuelled cars. The percentage figure is multiplied by a fixed amount. The charge is a fixed calculation irrespective of the amount of fuel used for such private journeys.

Lease car drivers are advised to seek advice on how this might affect them from HMRC direct.

For those using public transport we will reimburse receipted costs incurred over and above any existing season ticket or travel card and is subject to tax and national insurance.

3.4 How do I claim mileage for travelling to session?

If you make your own way to a session, this must be agreed with your manager, as in many cases we provide transport for you. However, if you are allowed to make your own way and need to claim mileage, your vehicle must be registered with 'grey fleet'.

3.5 What business mileage will I be paid if I am a home base worker?

If you are approved as a home-based worker, through the flexible working process, you will be paid business mileage from your home base less a nominal 10 miles each way. This will be automatically calculated in expenses.

3.6 When should I consider a hire car instead of my own vehicle?

Where travel by car is the right travel option:

- For a journey of 100 miles in a day you should consider the use of a hire car
- For a journey of 200 miles in a day, you must wherever possible use a hire car.

There will be however, circumstances where using your own car may still be the most suitable option such:

- Where an employee has a reasonable adjustment
- Where there are geographical challenges in picking up or having a hire car delivered
- In urgent or emergency situations, where the response time may be impacted by having to go through the hire car process.

4. Taxis

4.1 When is it permitted for me to use a Taxi to travel between home and work?

The use of a taxi as all or part of your journey between home and your normal place of work (or vice versa) is only permitted if you are:

- required by your manager to work later than usual and until at least 9pm

And

- late working is irregular (e.g. not every Friday and not more than 60 occasions in any tax year)

And

- by the time you finish work, public transport is:

Either

Unavailable for your journey home

Or

It is unreasonable to expect you to use it (for example because it is unreasonable for you to travel alone on public transport at that hour)

Note that “irregular” means “not part of your normal working pattern”, so fixed or rotating shifts do not qualify for this condition and neither does on call work.

There are specific arrangements in place for employee groups e.g. specialist nurses in OTDT.

4.2 When is it permitted for me to use a Taxi on business use?

The expectation is that in the interest of public expenditure, you should use public transport whenever possible, especially in London and other urban areas. The policy does not exclude the use of a taxi however you would need to be satisfied that economic, health and safety or time efficiency reasons justify it e.g. if several people are travelling to the same meeting the use of the taxi may be more cost effective than public transport.

A taxi fare or similar private transport will be provided or reimbursed subject to the Authorising Manager's specific approval:

- Where it can be demonstrated that the taxi fare is more cost effective;
- Where either individual, or shared use of a taxi by several employees, is more cost effective than public transport, **Or**
- Where parking fees for private car use would exceed the cost of the taxi;
- Where no reliable public transport facility exists.
- Where the routes/times of public transport facilities prevent staff discharging their duties efficiently.
- Where Health & Safety concerns warrant the use of a taxi, e.g. personal security, heavy luggage or equipment.

You must provide a receipt for reimbursement through the expense system.

4.3 How do I claim if several employees were travelling in a taxi?

One of the passengers should pay and claim with the receipt. The names of those travelling should be listed on the receipt or submitted with your claim.

4.4 When can I charge a taxi fare to an NHSBT account?

Taxis must not be booked on account at any NHSBT centre for the transportation of an employee in any circumstances.

You will need to contact procurement to set you up to be able to book through our travel provider, taxi's for business without the need to pay the driver yourself. However, you will need to sign for the journey at the time of travel.

4.5 What taxi service can I use when using taxis for business purposes?

We acknowledge that taxis are sometimes required to get you to and from locations for business purposes. Hackney carriages, such as London Black Cabs and others operating in most cities, can pick up passengers on the street, without a booking. This type of taxi also typically operates out of train stations and some airports. You can obtain receipts from them for you to claim the expense you have incurred.

Private Hire vehicles (or minicabs) is available for hire only on a pre-booked basis. Our centres will often have a range of numbers for you to contact to book a Private Hire Taxi for your journey, or you may have your own preferences if travelling local to your home or place of work.

More recently, some Taxi companies, have an on-line presence or provide an 'In App' service, which you may have available on your Smartphone. To use these services, you would need to have set up your account 'In App' to allow you to access them where they operate. (Note: they do not operate in every town and city).

The benefits of 'In App' taxi services are often:

- you can indicate the number of passengers and therefore the size of vehicle you need
- you will have an indication of the cost of the journey upfront
- they are sometimes cheaper than other Hackney or Private Hire vehicles (but not always)
- you will know the car registration, name and contact number of your driver
- normally no cash changes hand as it is all done in your app using your card payment detail you have previously submitted
- you will receive an e mail confirming the cost at the end of the journey
- this e mail can easily be copied for you to use in the Expenses App for your claim

When using a Taxi for business purposes, while one key consideration is cost, you will also need to ensure that any means of transport is also time efficient and that you feel safe.

5. Accommodation and Meals

5.1 What are the approved limits for hotel accommodation and meals?

Accommodation	Maximum Limit	
	Outside city centre	City Centre
Room Only	£80	£120
B&B	£90	£130
B&B and Dinner	£115	£155
Cost of Dinner	£25	£25

If you are unable to book within these limits:

- you must provide justification approved by your manager
- you should claim reimbursement as receipted expenditure, up to the maximum limits shown below.

Meals

Normally you are asked to claim receipted expenditure, however, in other circumstances; the standard allowances may be claimed.

These allowances will be subject to tax and National Insurance. You cannot claim a meal allowance and a receipted claim for the *same* meal.

Provision	Reference in Terms and Conditions of Employment	Receipted maximum limit	AfC Subsistence allowance
Breakfast (early start)	Must be receipted (there is no AfC allowance) <ul style="list-style-type: none"> • When leaving home earlier than usual and • Before 6.00am and • Away more than 5 hours 	£5.00	None
Breakfast (overnight)	Breakfast on an overnight stay is covered in section above when part of a B&B cost. If Bed only hotel booked then breakfast claim must be receipted (there is no AfC allowance)	£10.00	None
Lunchtime Meal Allowance	More than 5 miles from base, away for more than 5 hours, including the time between 12.00 and 14.00 hours.	£5.00	£5.00, subject to tax and National Insurance deductions
Evening Meal Allowance	Away from base more than 10 hours and does not return home until after 19.00.	£25.00	£15.00, subject to tax and National Insurance deductions

You will also be required to confirm that the expense was incurred **after** the start of the business journey. Receipted meal reimbursement cannot be claimed when you are away on business at a temporary place of work which is another NHSBT or NHS site when a meal is available at the NHS establishment employee rate.

You are expected to arrange your workload to minimise expenses incurred. You will not be able to claim if the relevant meal has been provided to you by NHSBT or third-party hospitality.

A meal allowance includes up to a maximum of 2 drinks (including any alcohol). Any receipted expenses must include any drinks and not exceed the permitted maximum.

Alcohol consumption is only permitted when you are outside of or not due to return to business working hours. For more information refer to the Alcohol, Drug and Substance misuse policy.

5.2 Can I make my own arrangement for travel or accommodation and claim this back?

Our approved contracts and booking systems must be used whenever possible. If you book your own accommodation, rail or air travel, rather than through the appointed travel provider, or make your own arrangements, any costs incurred will be at your own expense and not billed back to NHSBT by the provider. However, with proper justification for not using the appointed travel provider and authorisation from your manager or budget holder *prior* to such bookings, you will be reimbursed through the expense system.

5.3 Who is responsible for monitoring travel and associated expenses?

Managers must ensure that:

- Your expenses claimed are necessary, reasonable and within the terms of relevant policies
- Your journeys are necessary for you to perform your duties
- They must review expense claims and statements and approve/reject in a timely manner
- Any areas of concern or instances of non-compliance are addressed.

5.4 How do I book travel and accommodation?

You are expected to book your travel and accommodation through the travel provider.

When looking at accommodation, it is important to look closely at what is included such as wi-fi, meals, parking etc. If they are not, you may need to cover these expenses and submit a claim. Also note the cancellation policy to ensure additional costs are not incurred by the organisation.

5.5 How is business travel treated within my contracted working hours?

You and your manager are required to plan meetings to ensure that business travel time over and above your normal home to work travel time does not exceed your contracted working hours for the total week or contractual work cycle. Business travel excluding the time normally taken for home to work travel is classified as working time.

5.6 How is time above my contractual working hours treated?

Normally, travel time is treated as work time, subject to local agreements. Business meetings and the frequency of meetings should be planned to avoid excessive amounts of travel time. Managers are required to regularly monitor your working hours. If on the rare occasion travel time causes your actual hours worked to be greater than your contracted hours, speak to your manager about how this will be facilitated.

5.7 How do I claim a tip/service charge?

Only those itemised on the bill/receipt can be reimbursed. Your total claim must not exceed approved limits.

5.8 How do I claim for meals at other NHS establishments?

This may only be claimed against receipted expenditure when:

- You are required to work away from your base location at an NHS establishment. You must meet the conditions for claiming the receipted allowance.

AND

- Where the cost of the meal is **not** provided at that NHS establishment's employee rate or where there are no facilities.

Both of these conditions must be met.

5.9 What is Mobile Subsistence Allowance (MSA)?

This allowance is paid to Donor Carers/BD nurses under their local terms and conditions.

5.10 When, as a Donor Carer/BD nurse, can I claim subsistence allowances?

You will be paid MSA allowance when on mobile sessions as defined by local terms and conditions. You may claim receipted expenses or subsistence when travelling on other duties e.g. training, meetings etc.

5.11 Who should claim for a group meal bill?

Ideally, individual receipts are preferred wherever possible. You must not photocopy a group receipt and claim individually. Should this not be available, then the most senior person should make payment so that the reimbursement is approved by a senior person not attending the meal. The names of all employees dining should be recorded on the claim.

5.12 What happens if the people sharing a meal are on different cost centres?

The employees either each obtain an individual bill and receipt, or it is agreed which cost centre will pay the group dining bill incurred as a result of the business meeting.

5.13 How do I claim for Hospitality which includes non NHSBT personnel?

Hospitality should be avoided at non-business locations unless there is a clear business need to do so. Provision of hospitality to guests will normally be covered by the provision of a working buffet lunch or when this provision cannot be made you may claim receipted expenditure for your guest(s) up to the value of the receipted expenses stated in this policy.

Hospitality should be modest and necessary for NHSBT business.

Expenses for hospitality must detail the number and names, their organisation and the reason for the hospitality.

5.14 Can I claim refreshments if I am travelling on business?

We are committed to your health, safety and wellbeing, and therefore we want you to rest as appropriate and within reason. If you are on a long journey and need to stop for a rest, or if you are travelling outside of normal working hours, it is reasonable for you to claim the cost of a hot drink. The limit for such receipted 'other refreshments' is £3.00, there is no AfC allowance.

If you are travelling late at night, or outside of your normal working hours, you should claim a receipted meal as outlined above.

5.15 Is it permitted to work outside of the meal allowance limits?

Only with the explicit approval of the Chief Executive. Such approval will be exceptional and will be required *in advance* of the costs being incurred.

The allowance for meals is linked to travel away from your base location. In some exceptional circumstances the Chief Executive may approve reimbursement above NHSBT policy limits.

Although NHSBT policy is not to fund such events in exceptional circumstances the Chief Executive may give advance approval for reimbursement outside policy for events such as a team celebration to mark retirement or long service etc.

5.16 What is non-commercial accommodation?

This is accommodation that you would not typically pay extra for, for example if you stay with a friend or relative. It does not however, include a second property (or caravan/boat etc) that you may rent or own. The allowance paid is in line with NHS Terms and Conditions.

6. Taxation

6.1 When are expenses liable to tax and NI?

Standard allowances are subject to tax and National Insurance. Receipted expenses will be reimbursed without the deduction of tax and National Insurance. Where a receipt is not provided, tax and NI may apply.

6.2 How do I know if the location I am working at qualifies as a temporary work place?

HMRC defines permanent and temporary work places. Should you have any concerns, this can be raised with HR Direct.

7. Other

7.1 When can I claim 'late night duties allowance'?

Late night duties allowance may be claimed if you are requested to work a minimum of two hours in addition to your normal working day and to at least 7pm with less than 24 hours' notice.

7.2 When can I claim test and licence costs?

Those who are required to drive a specific group of vehicle, and your current driving licence does not allow you to drive these types of vehicles, where your manager requires to undertake the specific

driving training. In these circumstances we will reimburse the costs of your driving training which can be claimed through the expense system.

7.3 What is the role of NHSBT Pay Support in managing my expenses?

They will:

- Routinely review and check your receipts to support your claim.
- Apply correct tax regulations to your expense items when necessary, depending on the individual circumstances where you have not provided receipts as required by HMRC regulations.
- Administer system access, individual expenses profiles and manage the expenses system.
- Implement changes to the Policy or Statutory regulations within the system.
- Extract authorised expense items for payment each month, in line with the published timetable.

7.4 Can I claim for business services support?

If you are required use any external resources for business support such as printing or make an official business phone call while on business travel and/or in hotel accommodation, you may claim reimbursement for the actual expenditure but must provide itemised receipted proof of expenditure. The cost of any business calls made on personal phones (land-lines or mobiles) will only be made on a claim supported by an itemised invoice. The same applies for Wi-fi, parking etc, should this not be included in your stay or travel plans.

8. Receipts

8.1 Can I claim an expense if I have lost my receipt?

You should always provide a receipt wherever possible; however, we recognise that you may lose receipts from time to time. You must provide a detailed explanation on your expense claim, and this must be authorised by your manager, who may refuse if you have not provided enough information. The amount claimed will also be liable to income tax and national insurance.

8.2 Why do I need to put my claim in within 3 months?

If claims are stored for longer than this, then they are difficult to validate and approve. In addition, the amounts could become significant and will therefore distort financial statements. You are encouraged to reclaim your expenditure as promptly as possible.

8.3 How do I submit my receipt when claiming expenses?

You should always attach your receipt electronically to your claim for more information on claiming your expenses this can be found on [People First](#).

9. Insurance

9.1 Can I reclaim the cost of my policy if I take out personal insurance cover while travelling on overseas on business?

No. If you choose to take out additional insurance cover arrangements, this is at your own cost.

9.2 How will I know what overseas travel insurance provided by NHSBT covers?

If you are travelling overseas and you have received approval, you should contact HR Direct on (2)7700 or at HRDirect@nhsbt.nhs.uk and request an insurance application, complete and return as indicated and a travel insurance pack will be sent to you.

10. Fines

10.1 What happens if I incur a fine while on business travel?

You are responsible for all fines and any administrative or late penalty charges while on private or business travel. There are no exceptions to this.

11. Grey Fleet

11.1 What is 'grey fleet'?

The term 'grey fleet' refers to privately owned vehicles used by employees to travel on business.

11.2 Why does my manager have to authorise my documents?

Managers are signing to confirm sight of original documents and validate true copies for employees to provide to the 'grey fleet' administrator.

11.3 How do 'grey fleet' provisions apply if I have a disability?

We will make reasonable adjustments to ensure you are not disadvantaged when considering an application to use a private vehicle.

11.4 What are my responsibilities if I am using my own car (grey fleet) for business purposes?

You must ensure that your car is grey fleet registered and always complies with the law, is in safe and roadworthy condition and is suitable for its purpose.

11.5 What do I need to register a grey fleet vehicle?

To register your private car for NHSBT business use, you will need to:

- Provide copies, verified by your manager, of the vehicles business use insurance cover to the grey fleet administrator
- Provide your driving licence number and a generated unique check code (accessed through the DVLA website) to allow verification by the grey fleet administrator
- You must not use your private car on NHSBT business, unless it has been authorised by the grey fleet administrator

The grey fleet administrator will check that your vehicle is taxed and has a valid MOT through the DVLA website

Once authorised on the grey fleet register, you must notify your manager of any endorsements or limitations imposed on your licence, restrictions on your ability to drive and any material changes to your vehicle's insurance provision.

11.6 What vehicle insurance do I need for my grey fleet vehicle?

You must have Class 1 (or equivalent) business use cover on your policy.

11.7 Can I carry non-NHSBT passengers when using my own car (grey fleet)?

You should not carry any non-NHSBT passengers unless the carrying of such passengers is in connection with NHSBT business. If you do carry non-NHSBT passengers, other than those connected with NHSBT business and divert the business journey for a non-business purpose (e.g. dropping off, shopping, visiting family), then this portion of the mileage must not be included in your mileage claim.

11.8 What are the health and safety considerations when I am driving on business?

You should:

- be familiar with the controls of the car before setting off
- Never use a mobile telephone when driving, and should switch it off to avoid distraction
- Obey speed limits at all times and never drive faster than road or driving conditions safely allow
- allow time at the start of any journey for delays en-route: congestion, hold-ups and bad weather
- make sure you are fit to drive: do not start a long journey if you feel tired
- plan to take sufficient breaks: a minimum of at least 15 minutes after every two hours of driving is recommended
- Be able to read a number plate from a distance of 20 metres (66 feet)
- Wear your prescription glasses or contact lenses at all times when driving

11.9 How can I claim mileage for my own/grey fleet vehicle?

You will not be able to claim business mileage unless you have been approved for grey fleet. Should you need to register for this you will need to (add link to process)

On approval, NHSBT Pay Support will activate mileage in expenses.

If you are recalled to work, this is claimed under expenses, outside of grey fleet.

11.10 What is the role of the Grey Fleet administrator?

They will on behalf of NHSBT:

- verify tax disc and MOT certificates
- carry out driver licence checks
- carry out vehicle appraisals
- provide ongoing use of Grey Fleet risk assessments
- capture mileage and claims linked to ESR
- establish mileage, cost and carbon footprint baselines
- provide driver support/advice service

12. Policy Approval and Review

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13. FAQ's Section Details

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