

TRAVEL GUIDANCE FOR EXPENSES

The following is a guide to help you successfully claim any agreed travel and subsistence expenses. If you have any queries regarding your travel and subsistence claims, please contact inspirefinancials@uwtsd.ac.uk prior to any expenditure in order to ensure that the expense is claimable under the terms of the University's Financial Regulations. All staff are subject to the University's Health & Safety and Financial Regulations.

Prior to any travel please ensure that you have completed any training that is required, this can be accessed via the UWTSD Health & Safety SharePoint or the INSPIRE International Travel moodle page. Should you be undertaking international travel please consult [International Travel \(sharepoint.com\)](https://sharepoint.com/InternationalTravel) and ensure that you are familiar with University policy and that you have completed the training required. If you are travelling domestically and plan on driving please ensure that you have completed all the necessary steps to become an "Authorised University Driver", further details of this can be found at [Driving for Work \(sharepoint.com\)](https://sharepoint.com/DrivingforWork). This applies to driving your own or a hire vehicle. Furthermore, please ensure that all risk assessments have been completed, signed off by your line manager and submitted prior to travel. Failure to carry out University requirements, may result in your claim being denied.

The University carries travel insurance, however, it is your responsibility to ensure that this coverage is suitable for your individual needs. Please ensure that you read through the summary of cover provided at [Corporate Services - Travel Cover.pdf - All Documents \(sharepoint.com\)](https://sharepoint.com/CorporateServices-TravelCover.pdf). It is imperative that you pay attention to the exclusions and if any apply or may apply to you that you seek further clarification. The University will not be responsible for any loss that is not covered by the insurance provided.

Should there be a requirement for alternative insurance cover, payments for visas, medical inoculations or preventative medication i.e., for malaria etc. please contact us at inspirefinancials@uwtsd.ac.uk so that we can advise if these are a claimable expense. In many cases if this type of expenditure is a requirement and not elective it can be reimbursed.

If in doubt about anything, please contact inspirefinancials@uwtsd.ac.uk prior to booking or travelling.

Campws Caerfyrddin | Carmarthen Campus
SA31 3EP 01267 676767

Campws Llambed | Lampeter Campus
SA48 7ED 01570 422351

Campws Abertawe | Swansea Campus
SA1 8PH 01792 481000

Campws Caerdydd | Cardiff Campus
CF10 3GA 0300 131 3030

Campws Birmingham | Birmingham Campus
B11 4AR 0121 229 3000

Campws Llundain | London Campus
SW9 6EJ 0207 127 7400



In order to successfully claim your expenses, you will need to adhere to the financial regulations set by the University of Wales Trinity Saint. The financial regulations have been developed with the following principals in mind:

- The need for efficiency and effectiveness
- The importance that claims are speedily reimbursed for any expenses necessarily incurred
- The importance of ensuring that claimants are fully and speedily reimbursed for expenses actually and necessarily incurred
- The need for administrative arrangements to be adequate and in line with university and funding body accountability and audit requirements
- The necessity to minimise the environmental impact of travelling

General Information

All reasonable expenses that have been previously discussed and authorised will be reimbursed in accordance with the procedures set out below.

- Claim forms can be obtained in Welsh & English from [Cyllid | Finance - Travel & Expenses \(sharepoint.com\)](#)
- Please do not fill in any of the codes on the claim form as these sections will be completed upon receipt of your form
- Each item claimed must be stated separately and have an accompanying receipt. A credit card slip is NOT a receipt and will not support a claim; you must provide an itemised receipt for it to be valid.
- Please ensure that you give some detail as to why your trip is necessary under the “Purpose” column. Simply stating “research trip” or “interview” will not satisfy the University or funders and will result in the claim not being processed or paid.
- If taking scans or photographs of receipts to send via email, please ensure that they are clear regarding the establishment, currency and item including any VAT or GST. Illegible receipts will not be considered for reimbursement.
- If expenditure takes place in multiple currencies please ensure that you use a separate claim form each currency.
- Should you have a bank account in the UK and use your debit/credit card internationally and wish to be reimbursed the amount reflected on your bank statement, you must provide the bank statement with the accompanying receipt. If you do not supply a bank statement Finance will use the BoE rate on the day that they process the claim. Furthermore, if you are not providing a bank or credit card statement please state this when submitting the claim to avoid any delays.
- Any income tax liability which may arise from the payment of travelling and subsistence expenses shall be borne by the claimant.
- Advances for travel costs are not possible unless specifically agreed by the University.

- Claims must be submitted as soon as possible no later than one month in arrears unless previously agreed.
- Claims which do not conform to requirements & regulations will be automatically returned to the claimant for the appropriate amendment prior to resubmission.
- Receipts will be checked for clarity and value for money. In the event of receipts and claims not being satisfactory or receipts being illegible, payment will be withheld.
- Third party invoicing for services such as taxis, meals etc. will not be reimbursed unless it has been previously authorised and INSPIRE have been informed.
- In the case of an emergency with regards to lost or stolen items such as cash or bank cards while away from home, third party billing may be considered for reimbursement provided that appropriate proof of the situation and itemised receipts are provided detailing expenditure. The proof required would also need to be collected for insurance purposes and any claims that you may have. (Please see [International Travel \(sharepoint.com\) for details](#))

Travelling

Approved Travel Provider

All international travel must be booked via the University's approved travel provider. Currently, this is *Clarity Business Travel*. Should you not use *Clarity Business Travel* you run the risk of your claim being ineligible for reimbursement. International travel through Clarity Business Travel is booked through the University and therefore, there is no requirement for any personal expenditure.

Public Transport

Public transport is the means of journeying which should be used whenever it is practicable and efficient in terms of time and cost.

Travel should be at second-class rates. Under exceptional circumstances travel at first-class rates will be permitted. These must be approved by the Director of Financial Services prior to booking.

Staff travelling by rail are required to pre book train travel as far in advance as possible and take advantage of any low cost options that may be available, particularly 'closed tickets'. Booking via the University's approved travel partner or Internet booking via the University purchase card is recommended.

Receipts and tickets are required to support any claim relating to public transport use if you have purchased the ticket yourself.

Taxi

A taxi journey may be a necessary component in travelling arrangements, particularly where there is no other practicable method of getting to or from the departure and arrival points on public transport. If this is the case, reimbursement is available on submission of a claim stating the reason why this mode of transport was necessary and supporting documents such as receipts.

Car

For return journeys in excess of 160 miles or where you may be undertaking journeys averaging 160 miles per day, it is preferred that you use a Hire Car. Currently, the University has two preferred Hire Car providers (*Enterprise & Days Rental*). Depending on your requirements each provider can usually accommodate a drop off and pick up service suitable for your needs. Hire Cars are booked through the University and therefore, there is no requirement for any personal expenditure.

If you undertake journeys in a private car, expenses are reimbursed on the basis of a payment rate per mile. This rate is set at 45p per mile. Your University allowance at the 45p per mile rate for up to 10,000 miles is per annum. For those who normally work in kilometres, you will have to convert the distance to miles when you fill out the expense claim form at the following value 1 km = 0.6213712 miles/ 1 mile = 1.609344.

It is essential that vehicles being used are insured for use in relation to business travel. The payment rate per mile offered includes an element to cover the cost of providing “business insurance”.

There is an expectation that it can be demonstrated that the expenses incurred represent value for money relative in terms of the route and time taken to undertake the journey.

Staff who use their personal vehicles for travel on matters where the University is required to reimburse them are required to be able to satisfy the following requirements:

- Hold a valid driving licence
- Have the required business cover on their vehicle
- The vehicle is legally compliant

For all types of personal transport the rates are as follows, however, the passenger allowance will only be eligible for those travelling with you who have been authorised to do so.

	First 10,000 Business Miles in Tax Year	Each Business Mile Over 10,000 in Tax Year
Cars and Vans	45p	25p
Motor Cycles	24p	24p
Bicycles	20p	20p
Passenger Allowance*	5p	5p

* Please note that the passenger allowance would not be payable for any person travelling with you that is not named either as a companion or a research participant/partner

Toll, Congestion and Parking Charges

These charges can be reimbursed if receipts in support of these claims are provided.

Fixed Penalties

The payment of any fixed penalties or fines incurred during journeys is the responsibility of the driver of the vehicle and will not be reimbursed by the University.

Air Travel

Domestic Travel

Should you find domestic air travel to be necessary please ensure that this is booked via the University approved supplier of Clarity Business Travel. Domestic air travel should be considered/used if it represents a saving over other forms of travel; and/or there is a significant saving in official time.

International Travel

Staff travelling by air are required to pre-book travel as far in advance as possible using the University's approved travel partner.

Staff should ensure that they familiarise themselves with all the terms and conditions of booking the flights and are satisfied with these before confirming the booking.

For all journeys lasting 6 hours or less, staff will be required to travel economy class.

Travel in excess of 6 hours may be supported at business class subject to approval by the Vice-Chancellor or his / her nominee..

Further guidance and policy on overseas travel is published on the Health & Safety SharePoint which can be accessed here [International Travel \(sharepoint.com\)](https://sharepoint.com)

Travel Insurance

It is the staff members responsibility to check that the University's travel insurance is appropriate for their individual needs. Special attention should be paid to the exclusions. If there are any doubts about the coverage please get in touch at inspirefinancials@uwtsd.ac.uk so that we may signpost you to the best person to speak to regarding your query.

Accompanied Travel

The University will not meet the travel and subsistence costs of a spouse/partner of a staff member. Where staff are accompanied either by a partner or family member, the additional cost will be borne by the member of staff. Furthermore, staff members that wish to travel with their partner will only be able to book their own travel through the University supplier and will not be able to book the travel or accommodation of their partner.

If for any reason a companion is required on your journey, please ensure that authorisation and funding has been arranged and agreed in good time prior to your journey. Failure to do so will result in your companion's costs being ineligible for reimbursement.

Subsistence

For journeys made by staff there is a facility in place to claim subsistence costs in line with the University's financial regulations.

Subsistence is a supplementary allowance which may be claimed to cover the additional cost element of buying meals, parking, tolls, emergency accommodation etc. away from home on previously agreed travel.

- Receipts are required for all subsistence claims regardless of amount. These receipts must be provided as itemised receipts and be completely legible. It is recommended that if you have a

smartphone with a camera that you take a picture of tills receipts as soon as you receive it, as often till receipts are thermally printed and can fade or get damaged very quickly and easily. If it is a double sided receipt, ensure that you capture both sides.

- A restaurant bill should be at a sufficient level of detail to identify separately food, soft drinks and alcoholic drinks.
- When receipts are submitted in support of claims that include non-claimable items such as newspapers, alcoholic drinks etc., it is the claimant's responsibility to ensure that these items are clearly identified or deleted by drawing a single line through the entry on the receipt. This should be done in a way that it can still be clearly identified as part of the total receipt.
- All claimants are expected to use the most economical means of overnight accommodation available in the appropriate area that is appropriate for their needs.
- It is the responsibility of the staff member to acquire alternative travel insurance if necessary. While policy costs may be a considered expense claim with prior authorization, any insurance excess in the event of a claim will be borne by the claimant, including any excess costs related to University insurance cover.

Subsistence

Accommodation

Bed & Breakfast

Where an overnight stay is undertaken due to the requirements of your journey, it is expected that you arrange this using the University's preferred supplier, Clarity Business Travel. However, it is recognized that on occasion situations may arise where staff will be required to book their own accommodation. Reimbursement may be available on submission of a claim supported by the appropriate receipts and statements. All accommodation should be booked on a bed & breakfast rate, however, should this option not be available then the maximum amount you may claim for breakfast on each morning of your stay would be £ 10.00.

LOCATION	BED & BREAKFAST RATE
London (Inner & Outer Boroughs)	£ 200.00 (Inclusive of VAT)
Other UK Capitals	£ 150.00 (Inclusive of VAT)
Other Sites (Including International/Overseas)	£ 130.00 (Inclusive of VAT)

Meals & Refreshments

The University will reimburse reasonable costs. Allowable expenditure is in line with the University Financial Regulations for travel & subsistence and must be supported by legible, itemised receipts with the currency type clearly indicated.

Criteria	Meal	Maximum Claim
Employee leaves home before 7am*	Breakfast	£ 10.00
Employee is away from home for 5 hours which includes the 12:00 – 14:00 hours period (12pm – 2pm)	Lunch	£ 10.00
Employee is away from home for 10 hours	Lunch & Dinner	£ 35.00 (total)

Employee has an overnight stay	Lunch, Dinner & Refreshments	£ 40.00 (total)
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*Where an employee is eligible to claim for breakfast this is over and above any amount claimed for lunch and/or dinner, therefore, the maximum daily claim would be £ 50.00

Extra Considerations

- On no account will the purchase of alcohol be reimbursed.
- “Per Diem” Allowances are not provided, while the maximum per day claim amounts are provided above, these must be supported by itemised receipts.
- Any reimbursement is subject to the University’s financial regulations and there is a robust claiming process. Failure to adhere to the financial regulations of the University will result in amounts claimed not being reimbursed. A number of checks are performed by various departments within INSPIRE and Finance as a standard practice.