

BARTS AND THE LONDON NHS TRUST

**RELOCATION OF NORMAL WORK BASE:
EXCESS TRAVEL ARRANGEMENTS**

TRUST CORE POLICY

REVIEW	April 2011
APPROVAL/ADOPTED	Trust Executive Group: 14.1.04 Policies Working Group: 20.1.04 Policy Working Group
DISTRIBUTION	Policy Liaison Officers for distribution to all staff involved in New Hospitals decant of services
RELATED POLICIES	Relocation Expenses Policy BLT/POL/09901/HR
AUTHOR/FURTHER INFORMATION	Director of HR, HRConsult

INTRODUCTION/PURPOSE OF THE POLICY

1. When a member of staff is required to be relocated and excess travel costs are incurred by the individual as a result, Trust will follow Agenda for Change terms and conditions of Service (i.e. section 17) in determining whether the individual is entitled to claim the costs involved.
2. The entitlements under Section 17 are clear and unequivocal and relate to genuine increased expense, for a maximum of 4 years. Reimbursement of excess travel when granted covers journeys by public transport (bus and second class rail fare) and/or extra mileage, at public transport rate, when a private car or motor cycle is normally used for journeys to and from work. It does not cover car parking, or any increase in the cost of car parking, or car parking spaces, unless these are contractual or provided on health and safety grounds.
3. Section 17 allows the Trust to exercise discretion in awarding excess travel expenses (within the scope as detailed above) and such discretion will always be based on what is reasonable in the circumstances.

APPLICATION: TO WHOM THIS POLICY APPLIES

4. This policy applies to all staff. It must be understood that making a fraudulent claim, or receiving expenses to which the member of staff is not entitled, will be viewed seriously and is likely to result in disciplinary action under the Trust Disciplinary Procedures.

This policy applies to all those working in the Trust, in whatever capacity. A failure to follow the requirements of the policy may result in investigation and management action being taken as considered appropriate. This may include formal action in line with the Trust's disciplinary or capability procedures for Trust employees; and other action in relation to other workers, which may result in the termination of an assignment, placement, secondment or honorary arrangement.

SUMMARY OF THE POLICY

5. This policy sets out the rules which will be applied in relation to determining whether any relocating staff are entitled to excess fares payments and how payment will be made. In circumstances where the Trust requires staff to move their normal work base, expenses in respect of genuine excess travel for journeys to and from home to the relocated work base may be payable, in line with Agenda for Change Conditions of Service, Section 17 and where the Trust is satisfied that the arrangements proposed are reasonable.

THE POLICY

6. Endorsement of consistent application of Agenda for Change Terms and Conditions section 17, recreated as follows:

“Employees who are required to change their base of work as a result of a merger of NHS employers or their acceptance of another post as an alternative to redundancy, may be reimbursed their extra daily travelling expenses for a period of four years from the date of transfer. The excess shall be calculated on the basis of the bus fares or standard rail travel or, if the employee travels by private motor vehicle, on the basis of the public transport mileage rate.”

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7. In order to ensure a fair and consistent Trust-wide approach, the principles shown below will be applied.
8. Expenses for excess travel cannot be paid for voluntary moves of normal work base.
9. Eligibility for excess travel claims ceases at the first voluntary change of circumstances, when the maximum 4-year period is reached and/or termination of employment.
10. Claims for excess travel must be evidenced and appropriately authorised. Claims will be subject to regular audit.
11. The amount of claim is fixed at the point of transfer regardless of the duration of the claim.
12. Under Inland Revenue rules, claims are subject to tax and national insurance deductions.

RELATED ISSUES

METHOD OF TRANSPORT

13. The Trust reserves the right to consider the reasonableness of individual claims and to ensure an appropriate level of authorisation and audit.

TAX AND NATIONAL INSURANCE DEDUCTIONS

14. Under Inland Revenue rules, all approved claims and payments are subject to tax and national insurance deductions. Any alternative arrangements in place prior to the approval of this policy will be honoured but any new claims approved must follow the policy.

FIXED SUM

15. The amount of any approved claim remains fixed at the point of transfer for the duration of the claim and for a maximum of 4 years, regardless of any increase in train/bus fares or petrol costs, unless expressly adjusted by National NHS Terms and Conditions of Service amendments.
16. Claims will be reimbursed only against the most economical approach available, i.e. annual not weekly season tickets (except as

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allowed for in paragraph 20 below). Where staff chose to purchase weekly tickets, reimbursement will be made on the annual calculation where this is at less cost.

ARRANGEMENTS FOR CYCLISTS AND PEDESTRIANS

17. In addition to detailing Public Transport mileage costs, Agenda for Change Conditions of Service, Section 17, Annex L provides for mileage costs for using a bicycle on Trust business. To ensure fairness and equity for staff, excess mileage incurred, in line with this policy, by staff who use bicycles to travel from home to the normal work base will be reimbursed in line with Annex L mentioned above.
18. Section 217 does not cover the purchase of a bicycle however the Trust has a bicycle loan scheme for which all staff may apply, through their line manager. The Trust will continue to make all reasonable endeavours to provide bicycle racks when moves of work base are necessary however these cannot be guaranteed and will by necessity have to be on a 'first-come-first-served' basis.
19. The Trust has also introduced a bicycle loan scheme for travelling between sites (contact Staff Benefits for further details).
20. Where staff currently walk to their work base approved officers of the Trust will authorise claims for the purchase of new rail or bus tickets on an individual basis in line with the Agenda for Change terms and conditions. This is necessary to ensure consistency and fairness, as factors other than pure distance may need to be taken into account, e.g. risk of new/amended route.

USE OF THE TRUST'S STAFF MINIBUS

21. The Trust is not obliged to provide inter-site travel that supports staff in their journey from home to work and where the provision of the staff minibus supports such journeys the Inland Revenue is likely to regard this as a 'benefit in kind'. Staff who currently use the Trust's staff minibus as part of their journey to and from work may continue to do so, however, staff minibus routes cannot be amended or timetables altered to support such journeys.
22. In circumstances where staff claim excess travel, e.g. the provision of a Zone 1 annual rail card, and then continue to use the staff minibus, the Trust reserves the right to seek reimbursement of the cost of the excess travel claim.

ARRANGEMENTS FOR PART TIME STAFF

23. Approved claims for excess travel are based on annual cost that is paid monthly. The very nature of flexible working arrangements is likely to make an annual claim inappropriate for some part time staff therefore to ensure the equity and appropriateness of claims, part time staff with flexible working patterns that do not support the purchase of an annual season ticket should submit monthly claims for authorisation.

THE CESSATION OF RIGHT TO CLAIM

24. Eligibility ceases when:
- The member of staff's circumstances change (however there may be an alternative entitlement to be calculated), e.g. change of home address, car sharing arrangements etc.;
 - The member of staff leaves the employment of the Trust;
 - The member of staff voluntarily applies for and accepts a change in post, regardless of the nature of the new post, grade or salary level, i.e. even if there is a decrease in salary; (*note: such circumstances would be rare but is in line with the 'fixed at point of transfer' concept*);
 - The 4-year maximum entitlement is reached.
25. In circumstances where the change of post is as a result of the redundancy of the post for which excess travel is claimed, eligibility will not cease, as the change is not voluntary.
26. The member of staff has full responsibility to inform the Trust of any change that affects eligibility for claiming travel expenses.
27. Staff will be required to evidence their claims and a regular audit will be undertaken.

METHOD OF CLAIM

28. Claim forms should be requested from your line manager. They are available from the Supplies Department.

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