

AGENDA ITEM NO. 6

CAERPHILLY COUNTY BOROUGH COUNCIL

EXCESS TRAVEL SCHEME

JANUARY 2008

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EXCESS TRAVEL SCHEME**

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1. INTRODUCTION

- 1.1. This scheme details the arrangements agreed by the Council regarding the relocation of employees from one work location to another where the new location is further away from the employee's home.
- 1.2. This scheme should be cross-referenced with the following policies of the Council. The
 - Disciplinary Procedure;
 - Flexible Working Hours Scheme;
 - Grievance Procedure;
 - Mileage Policy.
- 1.3. This scheme is available on the Council's intranet for employees to access. For those employees who do not have intranet access, Managers must ensure a paper copy is available on a notice board or at an accessible location for all employees, agency staff and volunteers. To ensure that an up-to-date version of the scheme is being followed, Managers and employees should refer to the intranet copy of the policy.

2. SCOPE OF THE POLICY

- 2.1. This scheme has been agreed with the Council's Trade Unions and will apply to all Council employees, except those school based support/teaching staff for whom the Governing Body sets the local terms and conditions of employment.
- 2.2. Wherever the designation Manager is used throughout this scheme, it is taken to mean Head of Service, Line Manager, Supervisor, Officer in Charge, Head Teacher or anyone who has a responsibility for employees through their work.
- 2.4. The effective date of the policy is zz.

3. PROVISIONS OF THE SCHEME

- 3.1 There will be one scheme for the Council, which will apply to all employees who come under the terms of the National Joint Council for Local Government Services including craft employees. The new scheme will replace any existing schemes, and the previous Purple Book scheme.
- 3.2 Payments will only be made under this scheme where an employee has incurred additional expenditure because they have been transferred from one work location to another location, and the new location is further from their home. Payments will not be made where the transfer is from a temporary relocation back to the permanent location, unless the permanent location has changed.
- 3.3 The date that an employee becomes eligible for the scheme is the date of the relocation or another mutually agreed date between the Manager and the employee(s) to be relocated.
- 3.4 Employees in peripatetic jobs, home workers, or jobs where as a condition of the appointment there are frequent changes of location will not be eligible under this scheme. (i.e. jobs with no fixed base or jobs where the base changes frequently)

- 3.5 Only additional expenditure incurred will be reimbursed. This will be the difference in the cost of travelling from the employee's home to the old work location and the cost of traveling from the employee's home to the new work location. Where there is no additional expenditure, employees will not be eligible for any payment.
- 3.6 To be eligible for a payment, employees must incur additional mileage and this must exceed 4 miles per day, a minimum of 20 miles per week after the old home to office mileage has been deducted. The rate per mile to be paid is 18p per mile.
- 3.7 Employees who travel to work by car will be paid the additional mileage incurred over the shortest route to the new location after the minimum mileage has been deducted. For example someone traveling an extra 10 miles per day, can only claim additional mileage of 6 miles per day as there is no payment for the first 4 miles of additional mileage.
- 3.8 Payment will normally be based on a maximum of two journeys per day, but where the working arrangements require, such as with split shifts, then four journeys will be paid.
- 3.9 Payments will only be made for the days that employees attend their work location. No payment will be made for annual leave days, sickness, training courses, etc.
- 3.10 Employees should make their claim to the 15th of each month. Therefore a claim for 12th June should be claimed in the period 16th June to 15th July. A petrol receipt or a ticket or receipt for the purchase of a public transport ticket must accompany all claims in the same way as the Council's Mileage Scheme. The VAT element of any claim must be shown in the same way as normal mileage claims. All claims for excess travel must be made on a separate form to normal business mileage. An example of the form to be used is attached at Appendix A.
- 3.11 Any payment made in relation to excess travel is taxable and the tax payable will be deducted at source by the Payroll section.
- 3.12 The scheme will only apply where the Council has instigated the transfer, not where the employee has moved on their own instigation, e.g. applying for a different post, has requested a transfer, or because of some form of disciplinary action, etc.
- 3.13 Payment of the excess mileage is intended to reimburse additional expenditure, and therefore will be based on the type of transport actually being used. Payments for additional childcare and additional car insurance costs should also be considered where appropriate. (All such claims must be accompanied with appropriate evidence of increased expenditure).
- 3.14 Where the payment is based on public transport costs, the cheapest form of transport must be used and either a receipt or ticket for each journey must accompany any claim. Additional expenditure will only be paid where the additional cost is more than 72p (4 miles x 18p per mile) per day.

- 3.15 Employees will be expected to certify that any claims are factual. Any employee who is found to have deliberately falsified a claim will be subject to disciplinary action.
- 3.16 Employees will also be responsible for reporting any changes in circumstances that could affect the allowance, e.g. a change in transport, or a change to their home address, etc.)
- 3.17 Where an employee who is in receipt of an allowance under this scheme moves home, the allowance should be recalculated to reflect the difference between the distance from the new home to the old place of work and the new home to the new place of work. If the distance is now shorter, and does not qualify under the conditions laid out in 3.5 and 3.6, then the allowance will be terminated.
- 3.18 Excess travel will only be paid for one relocation, unless there is a further move, which is of a greater distance from the employee's home than the original move. For example if an employee is moved from A to B, back to A and then to B again only the first relocation will be eligible for reimbursement. (Subject to the conditions laid down in 3.13). See Appendix B for examples.
- 3.19 Payment will continue whilst the actual additional expenditure is being incurred or for a period of three years from the date of transfer, whichever is the shorter.

4. REVIEW OF POLICY

- 4.1. The content of this policy will be reviewed every two years.

JANUARY 2008

EXCESS TRAVEL SCHEME – EXCESS MILEAGE CLAIM FORM

Name: _____ Employee Number: _____

Address: _____

Previous Work Location: _____

New Work Location: _____

Previous Daily Mileage/Cost: _____ Current Daily Mileage/Cost: _____
 (A) (B)

Excess Daily Mileage/Cost to be claimed per return journey
 after minimum mileage has been deducted : (C) _____

Additional Cost Per Day

For car journeys

Amount to be claimed = Excess daily miles after minimum mileage has been deducted
 per day x mileage rate (B) – (A) – (C) per day x mileage rate

For Public Transport claims

Amount to be claimed = Excess cost per return journey in excess of 72p minimum cost
 to be incurred.

Journey Record

Circle the days in which you undertook the excess mileage or occurred the additional
 cost during this claim period.

1	2	3	4	5	6	7	8	9	10	11
12	13	14	15	16	17	18	19	20	21	22
23	24	25	26	27	28	29	30	31		

Total Number of Journeys Undertaken =

Total Excess Cost Claimed = £
 (Amount claimed per journey x total number of journeys)

**I certify that I have incurred the additional mileage shown above for the number of
 journeys claimed.**

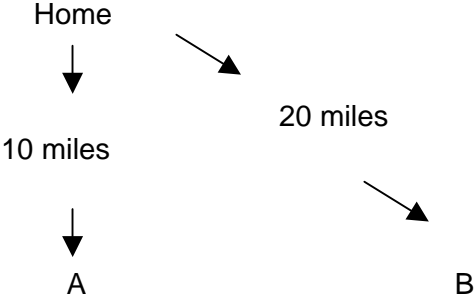
Employee's signature: _____ **Date:** .../.../....

Manager's signature: _____ **Date:** .../.../....

PLEASE FORWARD TO YOUR PAYROLL SECTION FOR PAYMENT

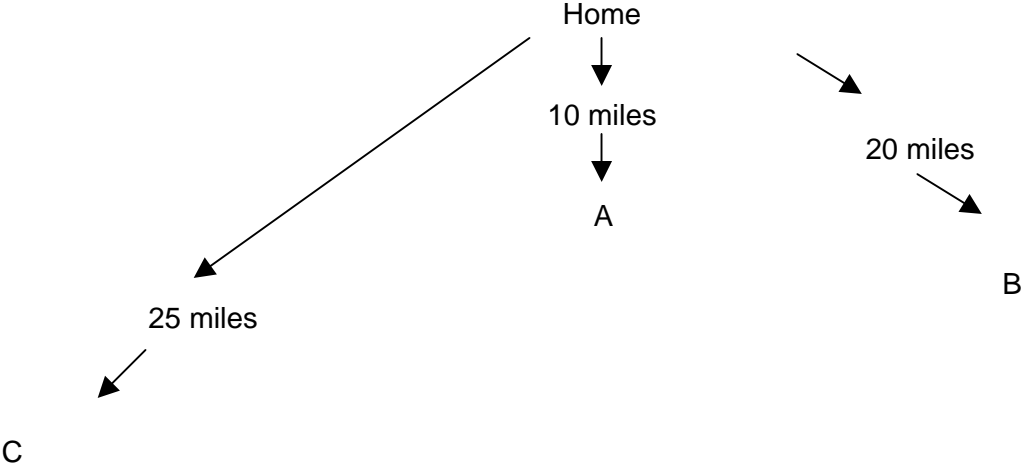
**CLAIM FOR RE-IMBURSEMENT OF EXCESS TRAVELLING COSTS -
EXAMPLES**

Example 1 - First move



Claim = B – A = 10 miles x 2 = 20 miles per day

Example 2 – Subsequent move (after 4 years)



Claim = C – B = 5 miles x 2 = 10 miles per day