



BUSINESS EXPENSES RECLAIM POLICY

Approved: January 2020
Review Date: January 2023

As a Church of England Academy we are inclusive of all regardless of creed, colour race, gender, sexual orientation or ability. We hope to transform the lives of our pupils, students and our wider community by putting our core values of love, integrity, generosity, hope and tolerance (LIGHT) into action. As such, all should feel welcome and respected. Schools are, in part, measured by academic success. Pupils and students know this. We must help and enable each pupil and student to succeed to the best of their ability by providing high quality lessons and an appropriate curriculum for our pupils and students.

Introduction

All Academy expenditure should go through the normal Academy purchasing and authorisation procedures. Staff should only incur business expenditure for incidental and unavoidable reasons, such as making a journey to attend an external meeting.

Aims

To recognise that there will be occasions when staff incur business related expenditure and that they need reimbursing for their expenditure, but to also ensure that staff fully understand what expenditure can be reclaimed, and that are reimbursements meet the HM Customs & Revenue rules.

Purpose

To clearly state upfront what business related expenditure can be reclaimed by staff from the Academy, and to provide a standard claim form and procedure to ensure that reimbursements are properly authorised and made in a timely fashion.

Procedure

1. The attached claim form must be fully completed and authorised for the reimbursement of business expenses.
2. All expenditure must be supported by attaching an original invoice or receipt to the claim form. Copies are not valid support.
3. Credit card statements, credit card payment slips and bank statements are not accepted as valid supporting documents.
4. When completed and signed by the claiming member of staff, the form needs to be checked and signed by the relevant Department Head.
5. All claim forms are then checked and signed as authorised by either the Principal or the Director Of Finance & Operations.
6. The completed and authorised claim forms should then be handed to the Finance Department.
7. All claims should be submitted within one month of the expenditure being incurred.

Expenses Policies

- Expenditure incurred on Academy business should be kept to the minimum and be wholly necessary and appropriate to the Academy's ethos and the staff person's duties.
- If in doubt, staff should obtain clearance for the expenditure before it is incurred.

Travel By Own Car

- Claims should be made for the number of miles travelled from home or the Academy, whichever is nearer to the destination.
- The current mileage rate for use of own car is the current HMRC rate per mile (at the date of policy 45p).
- Staff should ensure that their car insurance includes cover for driving on Academy business.

Other Travel

- Receipts should be attached for claims for reimbursement of travel by rail, bus, taxis, car parking etc.
- All travel by rail and air should be in economy class.

Subsistence

- Where a business trip takes up the whole, or a substantial part, of the working day, the actual reasonable incurred cost of refreshments may be claimed.

Alcohol and Tobacco

- In no circumstances can a claim be made for alcohol and tobacco. These are always personal expenditure items.

Accommodation

- If necessary, the cost of adequate, but not luxurious, overnight accommodation will be reimbursed.
- The Academy will reimburse the cost of the room itself and reasonable related meals.
- Items on hotel bills such as newspapers, private telephone calls, laundry, alcohol, in room movies etc. are personal expenditure items and cannot be reclaimed.

Foreign Travel

- Any member of staff travelling overseas on Academy business needs to speak to the Director Of Finance & Operations in order to obtain insurance cover.