

# **CCLRC PARTICLE PHYSICS PROGRAMME WITH PPARC**

## **UK TRAVEL AND EXPENSES CLAIMS – GUIDELINES FOR NON-CCLRC STAFF**

### **1. INTRODUCTION**

CCLRC, on behalf of PPARC, provides support for the UK experimental Particle Physics (PP) programme. The UK PP programme includes the requirement for University and CCLRC staff to undertake travel both in overseas and in the UK. All such travel and related expenses comes under these administrative support arrangements and is coordinated and paid through the CCLRC travel claims system, in accordance with the agreed programme and budget allocation. These guidelines inform you of the procedure for the reimbursement for UK travel.

### **2. BACKGROUND**

#### **General**

CCLRC operates a system of reimbursement of actual receipted expenditure for travel within the UK. No advance approval is required. You will be reimbursed allowable expenses for journeys, including all approved activities related to your project/running experiment and attendance at approved conferences and courses. In particular:

- Receipts will normally be required for expenditure on travel, accommodation, meals etc.
- Because of the practical difficulties of obtaining receipts in some cases, there is a facility for employees/visitors to make reasonable claims for non-receipted expenditure of up to £5 a day on food and refreshments.
- Indicative maxima are specified for expenditure on meals/refreshments and accommodation (see Annex A and B).
- A private accommodation allowance of £25 a night may be claimed for staying overnight with relatives/friends.
- Mileage allowances are payable for when using your own car on official business (see Annex B)

#### **Joint Venture Travel (JVT)**

JVT, the CCLRC travel service, can book flights, car hire and accommodation, and have negotiated corporate hotel rates across the country. JVT operate between 08:30 to 17:00 Monday to Friday inclusive. Please contact them on:

Tel: 01235 446718/5162/6085/6184/6543

Fax: 01235 446191

Email: [jvtdidcot@travelstore.com](mailto:jvtdidcot@travelstore.com)

#### **Value for Money**

Journeys should be planned carefully to ensure they are undertaken cost-effectively. In particular, you should take into account the whole cost of a journey, not just the

travel costs but also any additional accommodation costs (eg an extra over-night stop associated with a cheap flight).

You are expected to stay in accommodation of a reasonable standard in terms of cleanliness, sanitation, personal security and emergency procedures; in addition, meals should be readily available either at or within reasonable distance of the accommodation.

JVT, the CCLRC travel service, has access to specially negotiated rates (eg with hotels) and can also advise on alternative travel arrangements.

## Travel Options

**Road travel** may be undertaken using your own car or a hire car. If using your own car you must ensure that you have the appropriate insurance cover for business use. **Please check with your University Employer before travel.** As a guide, the minimum insurance requirements recommended for CCLRC employees is:

- a) normal third party insurance, including damage to the property of third parties, as required by law for all road users;
- b) cover for bodily injury to, or death of, any passengers;
- c) cover for use by the policy holder in person on official business;
- d) provisions :
  - i) that receipt of a mileage allowance does not constitute "*hire*", and receipt of a passenger allowance does not constitute "*hire and reward*";
  - ii) indemnifying the CCLRC as employer against third party risks to the same extent as the employee is covered by the policy.

Hire cars booked or arranged through CCLRC (ie via the JVT service) can only be used once the **Permit to Drive** form has been completed (Annex C). In all cases, drivers must be over 21 years of age and have held a **full driving licence** for at least 1 year.

You should normally use standard class for **rail travel**. However, you may travel first class where you intend to work during the journey and where standard class travel will not facilitate this or where other circumstances justify the additional expense.

**Air travel** within the UK will be by economy class and you will be expected to take advantage of the most economic fares available.

**Taxis** are expensive and should only be used where there is no practicable alternative e.g. for short journeys to the station where no public transport is available or where there is a potential risk to your safety (e.g. travelling late at night). Receipts should normally be obtained.

### 3. UK CLAIMS PROCEDURE

CCLRC's policy is to reimburse reasonable actual expenses. What is reasonable will depend on the circumstances; but claims for overnight/daily expenses should not normally exceed the indicative maxima shown at Annex A.

The UK Claim form for **UK** travel can be found on the Particle Physics web pages at <http://www.particlephysics.ac.uk/research/travel-and-claim-forms/ClaimFormUKPPD.xls>

You should normally submit claims within one month of the travel. Since late claims may be difficult to check, claims not made within 3 months may be disallowed.

Please ensure that Claims forms are filled in correctly; incorrect or incomplete forms will be returned to you, which could delay payment. In particular:

- \* Remember to include the correct Project Code and Org Unit codes as this will avoid delays in payment. Project Codes will be provided to you by the Budget Holder for your project/running experiment. A list of the Organisation Unit (Org Unit) codes to use is attached at Annex D.
- \* The amount to be claimed should be totalled and entered in the Grand Total box
- \* Receipts should be stapled to the form to ensure they do not get lost
- \* Claim forms should be signed by the claimant and
- \* Authorisation (ie. countersignature) should be obtained before submitting the claim form.

Claim authorisation should normally be from the nominated Budget Holder for your project / running experiment, although in some cases this responsibility will have been delegated to other named individuals (eg for each collaborating group or a specific project code). If the Budget Holder or nominated signing authority is away and unable to sign the form, an **accompanying** email from them giving approval is acceptable.

If in doubt about any of the information requirements above, please contact PA PPD Director, RAL PPD at [mailto:PA PPD Director@rl.ac.uk](mailto:PA_PPD_Director@rl.ac.uk).

Receipts will normally be required to support all claims for expenditure. However, expenditure on food and refreshments which amount to less than £5.00 per day in total will be paid without receipts, if the expenditure is described and seems reasonable. Conversely un-receipted claims for any expenditure over £5.00 a day (including food and refreshments) will be disallowed unless justification is provided as to why receipts could not be provided.

The completed and authorised claim form, with supporting receipts, should be forwarded to PA PPD Director who will arrange for the claim to be forwarded to the CCLRC SPBU Claims team for processing and payment.

Post: PA PPD Director  
Particle Physics Department  
Rutherford Appleton Laboratory  
CCLRC  
Chilton, Didcot  
Oxon, OX11 0QX

Tel: 01235 445448

Fax: 01235 445672

Email: PAPPDDIRECTOR@rl.ac.uk

**If you have any queries relating to expense claims generally, allowable expenses or the subsistence rates to use, please contact Rose Hayes in the CCLRC SPBU Claims team at <mailto:R.Hayes@rl.ac.uk> or by phone: +44 (0)1235 44 6908**

<b>INDICATIVE MAXIMA FOR REIMBURSEMENT OF OVERNIGHT/DAILY EXPENSES</b>
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CCLRC's policy is to reimburse reasonable actual expenses. What is reasonable will depend on the circumstances; but claims for overnight/daily expenses should not normally exceed the following indicative maxima:

Overnight Accommodation (per night, UK) (Bed and breakfast)	£100 (£120 London)
Light meals and refreshments during a trip/visit lasting 5-10 hours	£8.50
A main meal and other refreshments during a trip/visit lasting more than 10 hours	£17.00
Private accommodation allowance (per night)	£25.00
Maximum reimbursement for vouched personal incidental expenses (per night)	£5.00

If actual expenditure exceeds any of the above indicative maxima you should obtain Budget Holder approval of your claim.

JVT, the travel service used by CCLRC has negotiated discounted rates for hotel accommodation for corporate use. Contact them for quotes on 01235 44 6718/ 5162/ 6085/ 6184/ 6543

**RATES OF TRAVEL ALLOWANCES****CARS****1. "Approved" Mileage Rates**

(Applicable up to 130 miles per day)

First 4,000 Miles: 40.0p per mile

Over 4,000 miles: 25.0p per mile

**NB It is important to note that for your personal tax liability, the total business miles you claim each year need to be taken into account, not just mileage claimed under the UK PP programme funded and administered through CCLRC**

**NB. Please check with your project's/running experiment's budget holder - usually the UK Spokesperson - before claiming the "approved" mileage rate for the first time to ensure the rate is approved.**

**2. Permissive Mileage Rate**

This is currently set at 25.0p per mile.

**3. Passenger Supplement**

First passenger 2.0p per mile

Each additional passenger 1.0p per mile

**MOTOR CYCLES****1. Approved**

First 4,000 miles

Up to 125cc 16.2p per mile

Over 125cc 25.3p per mile

Over 4,000 miles:

Up to 125cc 6.1p per mile

Over 125cc 9.0p per mile

**2. Permissive**

Up to 125cc 11.0p per mile

Over 125cc 23.0p per mile

**BICYCLES**

This rate is set at 6.0p per mile.

**EQUIPMENT SUPPLEMENT**

This rate is set at 2.0p per mile.



## Vehicle Insurance - Permit to Drive

This Notice sets out rules which came into effect on 1 September 2000 to the driving of:

- a. unregistered vehicles owned or hired by CCLRC and used within the Council's sites in the UK, and
- b. vehicles owned or hired by CCLRC which are registered in the UK, including when such vehicles are used abroad.

See paragraphs 14 - 17 below for arrangements for vehicles registered abroad.

2. The main purpose of the rules is to ensure that all drivers meet the requirements of our vehicle insurance policy, for their own and the Council's protection. 'Drivers' may be staff, other people driving on CCLRC business, or other people whose use of a vehicle is charged to a CCLRC project code.
3. Our insurers require us to -
  - a. check that each driver holds a current Driving Licence issued by DVLA (or an equivalent foreign issuing authority) qualifying him or her to drive the type of vehicle to be driven.
  - b. report to them all endorsements and any medical restrictions noted on a Driving Licence.

The CCLRC Permit to Drive system enables us to satisfy these requirements.

### The 'Permit to Drive' card

4. Before driving a CCLRC owned or hired vehicle the driver must apply to Support Services Division for a CCLRC Permit to Drive using form CLRC 2 (06/00) obtainable from the contact points at (a) below.
  - a. The completed form and Driving Licence (not a photocopy) should be sent or taken to -
    - DL - Operations Support Team, A60 (extension 3833),
    - RAL - Transport Section, R54 (extension 6778), or
    - Chilbolton Observatory - Administration Officer (extension 2300).
  - b. A photocopy will be made of the Driving Licence which will be returned immediately. **Every time there is a change to a Driving Licence the driver must immediately inform Support Services Division** and submit the new licence to be photocopied.
  - c. Details on the licence will be treated as MANAGEMENT IN CONFIDENCE, but may be passed through our insurance brokers to the insurance company.
  - d. The Council, and its insurers, reserves the right to refuse to issue a Permit to Drive, or to impose restrictions on driving.
  - e. Driving on a Provisional Driving Licence will only be permitted when the driver is undergoing training at CCLRC's expense.

### **Extent of insurance cover, and other issues relating to insurance**

5. Cars, estate cars and light vans (owned or hired) used as self-drive vehicles will be insured on a comprehensive basis for business, social, domestic and pleasure use.
6. Other vehicles will normally be insured Third Party and Passenger for business use only, with upgrading to Comprehensive cover for business, social, domestic and pleasure use being at the discretion of Support Services Division.
7. Dangerous goods (as defined in the Carriage of Dangerous Goods Regulations) must not be transported off site in CLRC owned or hired vehicles. The Laboratory's policy is to use an appropriate specialist contractor arranged through Stores. If dangerous goods are to be transported on site you must first carry out a risk assessment. Our vehicle insurance policy does not cover such transportation. For information on the Carriage of Dangerous Goods Regulations contact Transport Section (extension 5544).
8. Insurance Certificates may be obtained when required from Transport Section, RAL (extension 6778) or Operations Support Team, DL (extension 3833).

### **Foreign registered vehicles**

14. Vehicles must be insured and registered in the same country. CCLRC's UK vehicle insurance policy cannot therefore offer cover to foreign registered vehicles.
15. Overseas Liaison Officers will be responsible for ensuring that appropriate insurance cover is arranged for any vehicles operated by CCLRC at their establishment and for setting local rules under which these vehicles may be driven.
16. Hire of foreign registered vehicles may only be arranged through Travel Section who will be responsible for ensuring that appropriate insurance is arranged through the hire company.
17. At present no CCLRC owned vehicle is registered abroad. If there is a case in future, insurance cover must be arranged locally in consultation with Support Services Division.

### **Other issues**

18. On the Council's sites drivers must observe all statutory requirements and rules in the Highway Code which would apply if they were driving on a public highway, and must obey site speed and parking restrictions.
19. Drivers are expected to read and comply with the instructions issued with each vehicle. These instructions cover use of the log book, fuel, responsibility for road worthiness checks, reporting of defects, breakdowns, accidents and the Council's liabilities.
20. All incidents of vehicular accident, damage, theft or fire must be reported immediately to Transport Section, RAL (extension 5544) or Operations Support Team, DL (extension 3833) who will issue the necessary report forms. These must

be completed and returned promptly to enable an insurance claim to be submitted when appropriate.

**CCLRC ORGANISATION UNIT CODES**

Organisation Unit Codes must be provided on all travel forms. The codes to be used are as follows:

Lancaster	PUA	Glasgow	PUG
Birmingham	PUB	Imperial	PUI
Cambridge	PUC	Liverpool	PUL
Edinburgh	PUE	Manchester	PUM
Brunel	PUN	Bristol	PUT
Queen Mary	PUQ	Oxford	PUX
RHUL	PUR	UCL	PUU
Sussex	PUZ	Sheffield	PUS
Southampton	PU0	General	PUO
Warwick	PUW		