Travel and Expenses FAQ Version 3 12th February 2020

These are organised by the Travel and Expenses policy sections.

Section 1: Booking and paying for travel and accommodation

Who are the University’s contracted travel suppliers?
The current contracted travel suppliers are:

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise rent-a-car</td>
<td>UK vehicle hire</td>
</tr>
<tr>
<td>NYS Corporate (Capita); or</td>
<td>All other UK and overseas travel arrangements</td>
</tr>
<tr>
<td>Selective Travel Management</td>
<td>(rail, hotels, flights, overseas car hire,</td>
</tr>
<tr>
<td></td>
<td>ferries etc.)</td>
</tr>
</tbody>
</table>

Can I use any other supplier to book travel?
Yes, use of contracted suppliers is strongly recommended but you may use alternative suppliers, particularly where the contracted suppliers are more expensive or aren’t able to supply the service you need.

For example, NYS and Selective cannot book:

- Accommodation with a private landlord e.g. Airbnb
- Hotels / guesthouses in remote overseas locations that take cash only
- Accommodation in high-risk locations
- Flights with airlines that have a poor safety record
- Trips where you need to pay some of the cost with a personal card e.g. part-business, part vacation or trips where you are taking a companion
- Travel that involves part-paying with personal loyalty points to get a cheaper price

You may also wish to check alternative suppliers if:

- You only need to take hand luggage when flying (NYS/Selective booking tools tend to include a suitcase)
- You need to book internal flights or rail travel in overseas countries (can be cheaper to book whilst overseas)
- Your quotation from NYS/Selective includes the words - ‘local taxes may apply’
- You wish to book online with Premier Inn (NYS/Selective booking tools don’t always show taxes in the price and the full range of meal packages you can book)
- You want to fly with a low-cost airline and may need to make changes after booking e.g. add a meal. Our travel suppliers may charge a fee to make changes.
- You want to book train tickets for a group of people that need to sit together (you can only do this online if you use the train operators own website e.g. Virgin but please note you can ask the agent’s travel desk team to do this for you)
- You want to see if split ticketing would result in a better UK rail ticket price - not yet available on NYS / Selective’s online rail booking tool, but available on Trainline

If I book my own travel (flights, hotels etc.) do I need to keep evidence that the cost was cheaper than booking using the Universities contracted travel suppliers?
There is nothing specific in the policy or process requiring this, though departments may decide locally this is required.

I'm attending a conference and I don't know if anyone in my department holds a purchase card. Can I pay for this on my own personal card and reclaim?

Please email pcard@york.ac.uk to check who holds a card in your department. The Procurement Office also has a card and can pay your conference fee if required.

If you wish to pay with your own card, we recommend you use a **credit** card (not a debit card) to ensure you're covered if there are any issues e.g. organiser goes out of business after you have paid your fees. You must only claim for the conference fees **after** you have attended the conference in case you can't go for any reason.

### Section 2: Air travel (including part business / part vacation trips)

**My flight was delayed and I missed a connecting flight. What should I do?**

The airline you travelled with will normally book you onto the next flight if the delay is their fault. They should also provide accommodation and meals if the delay is significant. In some cases, however, they may advise you to make your own arrangements. If you have booked with the University travel agents, please call them for assistance. If not, please make your own arrangements, keep any evidence that you have kept costs to a minimum and submit an insurance claim via insurance-enquiries@york.ac.uk

**What happens to the air miles when we purchase flights from the contracted travel suppliers?**  **NEW FAQ**

The University is enrolled in three corporate loyalty schemes and we accrue air miles when we book with certain airlines. These points are allocated to the International team as it would be difficult and time-consuming to try and allocate the points to departments. However, the airlines also allow travellers to collect points for their own personal loyalty schemes when flying on business. To do this, just add your loyalty scheme membership numbers to your personal profile in the online air booking tools or contact NYS or Selective and ask them to add this information to your personal profile. When you next book a flight via NYS or Selective, the points will automatically be added to your account.

**I'd like to use a departure lounge when I fly economy class on university business - will the University pay for a pass?**  **NEW FAQ**

The University’s policy is that it will not pay for individual lounge passes. They can be expensive and the benefit is limited because most travellers are trying to spend as little time in the airport as possible. However, we are investigating a corporate lounge scheme membership which would be open to all staff.

**I'm flying from a regional airport. Am I allowed to take a taxi?**  **NEW FAQ**

Most airports have good public transport links and you can go directly to the airport by train (e.g. Manchester) or by train plus airport bus (e.g. Leeds Bradford). This is the most sustainable method of travel and should be used if practical and safe to do so e.g. you are travelling during the day, when public transport is readily available. However, you may need to consider alternatives if you are travelling at night when public transport is scarce. Please compare the cost of hiring a car (each way hire to and from airport plus approx cost of fuel), driving your own car (return journey mileage claim plus cost of parking at airport), or taking a taxi (cost each way) and use the most cost effective option.
My flight was delayed. Can I claim compensation?
Airlines usually compensate passengers for significant delays. The amount of compensation will depend upon the length of the delay. The University’s policy is that the person directly affected by the delay should claim and keep the compensation. Please apply for the compensation on the operator’s website and provide your personal bank details for them to pay you. If you wish to donate the compensation back to the University, please do a bank transfer to the University bank account (see bottom of https://www.york.ac.uk/staff/finance/information-for-suppliers/ page for account details) quoting the account code and workorder you want the money to be paid into. Please also email cash-office@york.ac.uk with the details so they can identify the money when it arrives.

I’d like to add a holiday onto the end of my business trip. Will the University still pay for my flights?
If the primary purpose of the trip is business and the holiday is an incidental benefit (and provided evidence supports this) then the University will pay for the outbound and return flight as this would have been required anyway for the business trip. However, if you are planning to travel onwards to a different destination for your holiday and this requires extra travel, the University will not pay for those extra travel costs.

I’m going on holiday with my family and have paid for the flights. I’ve now been invited to a business conference in the area. Can I claim for the cost of my flights?
This would not be allowed as the main reason for the trip is a holiday and the flights have already been booked for that purpose. The conference attendance would be incidental.

Section 3: Rail travel

I’m not based on campus - how do I collect my rail tickets?
There are three options:

- Ticket on Departure (ToD) - use the booking reference to collect from the station
- Mobile ticketing - download your ticket via the Evolvi mobile app
- E-tickets - tickets are emailed to the traveller in pdf format and can be printed

I’ve printed my rail tickets but my meeting is cancelled. How do I get a refund?
If you booked with a NYS or Selective, please return the unused tickets to them. They will process the refund and credit the ticket amount back to the original workorder you provided when booking.
If you booked with an alternative supplier, please contact them about the refund. Any refund must be credited back to the payment card used.

Can I book first class rail travel for visitors who are travelling to the University?
The Travel and Expenses policy applies to visitors as well as staff. You can only book first class for visitors if they meet the conditions for first class rail travel stated in the policy.

The University’s travel policy allows me to travel by first class rail in the UK if I meet the criteria, but my research funder does not allow it. What do I do? NEW FAQ
As stated in the policy, where grant funding is in place and the funder’s rules are stricter, you must comply with those rules. If they don't allow first class travel, you cannot travel
first class. Please contact Research Grants and contracts for guidance if first class travel is used in exceptional circumstances.

My train was delayed. Can I claim compensation?
Train operators usually compensate passengers for significant delays. The amount of compensation will depend upon the length of the delay. The University’s policy is that the person directly affected by the delay should claim and keep the compensation. Please apply for the compensation on the operator’s website and provide your personal bank details for them to pay you. If you wish to donate the compensation back to the University, please do a bank transfer to the University bank account (see bottom of https://www.york.ac.uk/staff/finance/information-for-suppliers/ page for account details) quoting the account code and workorder you want the money to be paid into. Please also email cash-office@york.ac.uk with the details so they can identify the money when it arrives.

Can I use my personal Oyster card for business journeys on the London Underground and just claim for the amount I’ve topped up?
This is not allowed as you would need to provide evidence that the whole top-up was used for business trips to satisfy HMRC rules. Please add tube travel to your main rail booking (see below) or ‘pay as you go’ with a contactless card and provide copies of your statement.

How do I add London Underground travel to my rail booking?
You can do this easily on the University travel agents online booking tools. If travelling from York to London and then onwards to a location within Zone 1 for example, you would enter ‘York’ in the ‘From’ box and ‘Zone 1’ in the ‘To’ box [you can also add Zones 2, Zone 3 etc].

I used my contactless card to pay for London Tube and bus travel. How do I get a full receipt?
You can view online your travel history and receipts via the Transport for London web site (https://contactless.tfl.gov.uk/) even if you don’t have an account or Oyster card.

Section 4: Travelling by car or taxi (including rules on commuting)

I need to travel to a meeting and want to go in my own car so that I can travel on to visit friends afterwards. Can I do this?
If you could have travelled to your meeting by public transport and this would have been cheaper than driving, you must adjust the mileage amount claimed to what it would have cost using public transport.

Can I book a hire car for visitors who are travelling to the University or should they make their own arrangements to get here?
No - this is not practical as Enterprise require us to check the licence of each driver and add them to our database before the vehicle can be booked. Please encourage the visitor to travel to the University by rail / public transport where this is practical as this is the most sustainable method of transport. If they need to travel by car, they should hire a vehicle themselves or use their own car and submit a mileage claim.
When am I allowed to claim mileage when travelling in my own car? UPDATED

The HMRC allows employees to claim mileage for 'business journeys'. This is a journey that involves travelling from one place of work to another.

Example: you need to visit customers, clients or suppliers. You drive to work first and then travel on to see them. This mileage can be claimed.

If it makes more sense to travel from home to your meeting, you can claim the lower of:

- The mileage actually incurred, or
- The mileage that would have been incurred if the journey had started and finished at your normal place of work

The HMRC also allows employees to claim mileage if there is a need to travel from home to a temporary workplace. A workplace is classed as temporary if

a) an employee goes there for a limited duration (less than 24 months) or for a temporary purpose. (HMRC EIM32075)

b) an employee has spent, or is likely to spend, 40% or less of their working time there.

You are not allowed to claim mileage related to ‘ordinary commuting’.

‘Commuting’ is the journey between your home (or somewhere else that is not work-related) and your normal workplace. The HMRC classes this as private travel. You can’t claim mileage or any other transport costs for commuting.

My contract of employment is with the University of York, but I’m not based on campus. If I need to travel to the University of York campus from my normal place of work, can I claim mileage / other transport costs?

Yes you can claim for your travel costs if your normal workplace is elsewhere in the UK or overseas and you need to travel to the University of York campus for work purposes. This also applies to staff working in local off-site locations such as Osbaldwick or Dunnington.

Can I claim for travel between campuses?

Travel between Heslington West and East Campuses will not be reimbursed as there is a free University bus service between these sites. Claims for travel between Kings Manor and Heslington campuses will be reimbursed but public transport should be used wherever practical.

What distance can be claimed when using your own car?

You should use the actual distance travelled, unless there is a standard distance for the route. Google has very good distance calculators if you forget to set your trip recorder.

Mileage is being claimed - is there a way for the department to check if a claimant is on the University authorised driver list?

Please contact University insurance (extension 4059 or insurance-enquiries@york.ac.uk) to check.

Section 5: Overnight Accommodation (including travelling with a companion)
I’m staying abroad with colleagues or friends, in a third world country with a mainly cash economy. How do I pay and account for money used for this accommodation such as contributing to food costs?

In this situation where it is safer to stay with friends or family and eat with them, you can claim up to £10 per night for overnight incidental expenses without a receipt. For longer stays having a contract for the accommodation is recommended, so the University can pay for it directly or alternatively funds from a Cash Advance (note the minimum is £250) can be used if a bank transfer is not an option.

I want to book an Airbnb property and can meet most of the conditions set out in the Airbnb policy but not all. Is this ok?

Please email the Director of Health and Safety to discuss. If you don’t meet all of the conditions but the particular risk(s) can be mitigated, he may authorise you to proceed. You must not book without his authorisation if you can’t meet all of the policy conditions.

I’m travelling with my partner and have booked a double room. What can I claim?

If you would have stayed in the same hotel / room type if travelling alone, you can claim for the full cost of the room. If you would have stayed in a less expensive hotel or room if travelling alone, you should only claim for the cost of the less expensive room / hotel. You will need to provide evidence on the difference in cost.

I’ve found some Airbnb accommodation within the accommodation limit and the property is big enough to take my family with me. Can I do this?

The University’s accommodation limits are the maximum that the University will pay but staff are always expected to obtain best value, based on travelling alone. If you wish to travel with your family, you must obtain quotations for accommodation as if you were travelling alone on business. If the best value option is cheaper than the Airbnb option, you must only claim for that lesser amount when submitting your expense claim. Please note that Airbnb must only be used if your budget is limited or there are no hotels in the area - see policy.

---

**Section 6: Meals and drinks (including hospitality)**

I’d like to cook a meal at my home for a business visitor, rather than take them out to a restaurant. Can I claim the cost of the ingredients?

No - please take them to a restaurant or similar establishment that is licenced to prepare and cook food. They have to go through rigorous food hygiene inspections to prove they store and handle food correctly and they have insurance cover in the event of any food poisoning claims. If you cooked a meal for a visitor and they were ill as a result, the University’s insurance would not cover this. You would be personally liable.

---

**Section 7 - Other business expenses**

Can I still purchase a book from a conference and claim back on expenses?

You can’t claim for books on expenses. If a book is on sale at a special ‘conference’ price, purchase it using your own money and provide the receipt to your Department Manager / admin team. They should reimburse you from petty cash when you return.
Can I still claim if my professional body / learned society is not on the HMRC list?
This is not allowed due to the tax liability this would create for the individual claimant or the University. If you think that the professional body or learned society should be on the list, please let them know they can apply by completing this form on the HMRC website.

Professional subscriptions. If my subscription is due 1st January 2020 can I claim when the new policy starts 1st February 2020?
No; only subscriptions starting or renewed 1st February 2020 onwards will be paid so in the case above the first claim that can be made will be 1st January 2021. Note delaying actual payment until 1st February 2020 does not make it eligible either.

Some of our students have been helping us with an event on campus and have volunteered their time for free. Can we give them a gift or voucher as a thank you?
Unfortunately this would not be classed as a business gift, so this does not fall under this Policy. Please check with the Casual Workers team.

We do research work where participations in experiments are given a small gift for agreeing to help. Is this allowed and is there an upper limit for the amount to give?
Yes, as there is no tax liability, but do not use expenses claim to pay for them. Instead, use gift vouchers bought using a University purchase card to buy them or use petty cash. Upper limit to be advised.

I’m relocating to the UK to work at the University. Can I claim for my UK Visa / NHS surcharge?
These costs cannot be claimed via expenses unless you have been awarded grant funding from a research body (e.g. Marie Curie) and the grant conditions specifically include an allowance for mobility expenses. Otherwise, the University offers an interest-free salary advance to assist current or prospective overseas staff (non-EU) with payment of UK Visa fees and/or Immigration Health Surcharge (IHS) costs. Click this link for further details.

I get a personal research allowance from the university. Does section 6.8 of the travel policy apply to this money?
Yes - a Personal Research Allowance is an annual budget given to academic staff by their department to support their ‘research activities’ during the year. This is university money, so you must comply with the financial regulations as usual when spending it - always check whether there is a preferred or approved supplier first. You must not purchase items with your own money and claim on expenses. Any goods or equipment bought with your PRA remains the property of the University and must be handed back if you leave. This includes books.

I have an academic or student visiting the University for several days and have agreed to support them with their expenses for the duration of the visit. What can be claimed? NEW FAQ
The University Travel and expenses policy applies to visitors so should be followed and a visitors expenses claim form completed and submitted. Exceptionally, if there are issues around financial hardship, support in advance may be considered via an advance of cash. Any cash must still be accounted for (including receipts and spent in compliance with policy) and seeking advice is recommended before making any commitment to do this.
Section 8: Claims process (submitting and approving)

I don’t have a receipt for some costs that I incurred whilst travelling. Can I still claim?
The only time we can accept claims without a receipt is for Overnight Incidental Expenses incurred whilst staying away on business overnight. See Policy Appendix A. Otherwise, you **always** need to provide a receipt or a bank statement / credit card statement that provides evidence of the costs claimed.

**HMRC doesn’t require receipts for overnight incidental expenses if they are within the limits, but the external research funder for my work does. What should I do?**

**NEW FAQ**
Either provide receipts so they can be claimed against your grant, or otherwise the expenses have to be charged against another budget where receipts aren’t required. Please contact [Research Grants and contracts](#) if further guidance is needed.

I am attending a conference and the conference organiser is paying my expenses. Can I also claim the same expenses from the University of York?
No, you cannot claim for the same expenditure twice.

I’m on long-term sick / maternity leave / long-term research trip. How should I submit my expense claims within the 3 months allowed?
Please post or scan copies of your receipts to your department administrator. Please ask them to complete an expenses form on your behalf, obtain the correct signature and send the claim on to Accounts Payable. Alternatively they can send you a blank expense form to complete and send in with your receipts.

**Can I approve a colleague’s expenses if they approve mine?**
No this is not allowed. Claims should be approved by the budget holder (or line manager if the claimant is the budget holder)

I purchased my flight on my own credit card 4 months before the trip. Does the 3 month time limit for claiming expenses mean I can’t claim for it? **NEW FAQ**
The countdown for the 3 month limit only starts when you complete the trip you are claiming expenses for; in this case when you actually take the flight purchased. Thus, you can claim the cost of the flight.