



## **Personnel Committee**

Date: Wednesday, 15 December 2021  
Time: 2.10 pm (or at the rise of the Executive if later)  
Venue: Council Chamber, Level 2, Town Hall Extension

Everyone is welcome to attend this committee meeting.

### **Access to the Council Chamber**

Public access to the Council Chamber is on Level 2 of the Town Hall Extension, using the lift or stairs in the lobby of the Mount Street entrance to the Extension. **There is no public access from the Lloyd Street entrances of the Extension.**

## **Membership of the Personnel Committee**

**Councillors** - Bridges, Craig, Midgley, Rahman, Rawlins, Sheikh and White

## Agenda

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- 1. Urgent Business**  
To consider any items which the Chair has agreed to have submitted as urgent.
- 2. Appeals**  
To consider any appeals from the public against refusal to allow inspection of background documents and/or the inclusion of items in the confidential part of the agenda.
- 3. Interests**  
To allow Members an opportunity to [a] declare any personal, prejudicial or disclosable pecuniary interests they might have in any items which appear on this agenda; and [b] record any items from which they are precluded from voting as a result of Council Tax/Council rent arrears; [c] the existence and nature of party whipping arrangements in respect of any item to be considered at this meeting. Members with a personal interest should declare that at the start of the item under consideration. If Members also have a prejudicial or disclosable pecuniary interest they must withdraw from the meeting during the consideration of the item.
- 4. Minutes** 5 - 6  
To agree the minutes of the meeting held on 20 October 2021 as a correct record.
- 5. New and Revised Policies: Staff Travel and Revised Expenses Policy** 7 - 42  
The report of the Director of Human Resources and Organisational Development is attached.

## Information about the Committee

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The Personnel Committee is made up of the Leader of the Council, the other seven Members of the Executive, the Assistant Executive Member (Finance and Human Resources), and the Leader of the Opposition (where applicable).

Amongst its responsibilities, the Personnel Committee considers department staffing and organisational reviews; determines collective and corporate terms and conditions of staff and 'market rate' supplements. The Committee also determines the assignment and re-grading of certain posts and policies relating to local government pensions.

The Council is concerned to ensure that its meetings are as open as possible and confidential business is kept to the strict minimum. When confidential items are involved these are considered at the end of the meeting at which point members of the public are asked to leave.

The Council welcomes the filming, recording, public broadcast and use of social media to report on the Committee's meetings by members of the public. Agenda, reports and minutes of all Council Committees can be found on the Council's website [www.manchester.gov.uk](http://www.manchester.gov.uk).

Smoking is not allowed in Council buildings.

Joanne Roney OBE  
Chief Executive  
Level 3, Town Hall Extension,  
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Manchester, M60 2LA

## Further Information

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For help, advice and information about this meeting please contact the Committee Officer:

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This agenda was issued on **Tuesday, 7 December 2021** by the Governance and Scrutiny Support Unit, Manchester City Council, Level 2, Town Hall Extension (Library Walk Elevation), Manchester M60 2LA

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## **Personnel Committee**

### **Minutes of the meeting held on 20 October 2021**

**Present:** Councillor Rahman – in the Chair

**Councillors:** Akbar, Bridges, Craig, Midgley and White

**Apologies:** Councillors Leese, Rawlins and Sheikh

#### **PE/21/09 Appointment of a Chair for the meeting**

In the absence of the Chair the committee appointed a member to chair the meeting.

#### **Decision**

To appoint Councillor Rahman as Chair for the meeting.

#### **PE/21/10 Minutes**

#### **Decision**

To approve the minutes of the meeting held on 17 March 2021 as a correct record.

#### **PE/21/11 New and Revised Policies**

The Committee considered the report of the Director of Human Resources and Organisational Development that outlined new and revised employment policies for the Committee's consideration relating to the Third-Party Harassment and Abuse Policy and the revised Disciplinary and Employee Dispute Resolution Policies.

The Committee was informed that policies have been developed in response to the recommendations of both the 2019 Race Equity Review, and the subsequent Race Equality Working Group which highlighted the need to be more explicit within the Council's workforce policies about the organisational stance on race discrimination

Noting this, the committee agreed the recommendation.

#### **Decision**

To approve the new and revised policies, as detailed in the report submitted, relating to:

- Third Party Abuse and Harassment Policy;
- The revised Disciplinary Policy; and
- Employee Dispute Resolution Policy.

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**Manchester City Council  
Report for Resolution**

**Report to:** Personnel Committee – 15 December 2021

**Subject:** New and revised HROD policies: Staff Travel and revised Expenses Policy

**Report of:** Director of Human Resources and Organisational Development

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**Summary**

To outline new and revised employment policies for the Committee's consideration: the new Staff Travel Policy and the revised Expenses Policy.

**Recommendations**

The Committee is asked to approve the new policies attached to this report.

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**Wards Affected:** All

**Environmental Impact Assessment** - the impact of the issues addressed in this report on achieving the zero-carbon target for the city

The staff travel policy has been written following an action in the Manchester City Council Climate Change Action Plan 2020-2025. It introduces a travel hierarchy which prioritises lower carbon modes of travel.

<b>Our Manchester Strategy outcomes</b>	<b>Summary of how this report aligns to the OMS</b>
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	
A highly skilled city: world class and home grown talent sustaining the city's economic success	
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	

A liveable and low carbon city: a destination of choice to live, visit, work	The staff travel policy introduces a travel hierarchy prioritising sustainable modes for in-work travel.
A connected city: world class infrastructure and connectivity to drive growth	

**Contact Officers:**

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**Background documents (available for public inspection):**

None

## **1.0 Introduction**

The purpose of this report is to introduce the new Staff Travel Policy and outline proposed revisions to the Employee Expenses Policy. Comprehensive policy reviews have been undertaken engaging key stakeholders and trade union colleagues.

## **2.0 New policies**

### **2.1 Travelling Sustainably: Staff Travel Policy**

#### **Context**

The Staff Travel Policy has been written following a recommendation in the Manchester City Council Climate Action Plan for the Council to reduce its emissions through staff travel by 100 tCO<sub>2</sub> annually. The policy introduces a travel hierarchy based on the carbon emissions of each mode. At the top of the hierarchy is not travelling, with grey fleet miles and air travel at the bottom of the hierarchy.

The policy has been written following analysis of the journeys made by Council Officers by examining data on grey fleet miles claimed, taxis usage, car club miles and flights data both pre and post pandemic to understand where there are opportunities to reduce travel and change the mode of travel for the journeys taken.

This work has included a proposal to bring in a mileage rate for electric vehicles to encourage the transition to a more sustainable grey fleet. Taxi contracts, the Car Club contract and the travel booking tool contract are all being re-tendered in the first half of 2022 which present additional opportunities.

#### **Policy engagement**

Given that this is a new policy, significant engagement has taken place to ensure that the policy (and the guidance and training that will follow), meet the needs of staff, and services.

- Discussions have taken place with the HROD Business Partners to look at the data we hold on the way their services currently travel and to understand what the business requirements are now and may be in the future.
- More in-depth discussions with services where there are specific issues relating to travel currently.
- Presentations to the Zero Carbon Coordination Group for Workstream 2.
- Trade Union consultation throughout the different stages of the policy development process.
- The Business Disability Forum have been consulted on the policy to ensure that it is inclusive and accessible.

- A presentation was taken to the Ways of Working Volunteer Group to garner feedback and to address queries.
- Engagement with other organisations who have done similar pieces of work both locally and further afield including: University of Salford, Manchester Metropolitan University, The Christie, and TfGM.

Feedback from all these groups has been fed into the policy.

### **Policy Content**

- The policy highlights the need for the Council to reduce its carbon emissions through staff travel and recognises the impact of our indirect emissions through wider staff behaviours.
- It recognises that the decisions people make about travel need to take into account wider considerations in order for this policy to be inclusive and accessible.
- It Introduces a travel hierarchy that staff should use when making decisions about travel at the top of which is considerations as to whether the travel is needed and prioritising active and sustainable modes.
- Revised guidance and updated content on the intranet will be published to complement the policy.

### **Approach to Implementation**

- Directorates are being engaged on how they can implement the policy within their service areas. Feedback from these discussions will inform interventions that are planned post go-live.
- There is an opportunity to embed the policy through our travel contracts, three of which are being re-tendered in 2022: Taxi Contracts, Travel Booking (Diversity Travel) and the Car Club contract.
- Information on the policy will be added into the Carbon Literacy Training course which is a mandatory training course for staff.
- Monitoring of emissions by mode will continue quarterly which will enable a regular review of the impact of the policy.

## **3.0 Existing Policies: Review approach**

### **3.1 Expenses Policy**

#### **Context**

The guidance on how to travel was previously included in the expenses policy, following the extraction of this detail, the expenses policy has been re-worked as a stand-alone policy.

#### **Policy Content**

The content is not materially different and the main changes to this policy are:

- Minor changes have been made to the amounts for which staff can claim expenses. These are summarised below:

<b>Expense</b>	<b>Previous amount</b>	<b>New amount</b>	<b>Justification</b>
Flu Vaccination	£10.00	£15.00	Boots, Well and Lloyds all charge between £14-15 for a vaccine. This change has previously been agreed by SMT (6 <sup>th</sup> July 2021).
Eye Test	£20.00	£25.00	The average cost of an eye test is between £20-25. 293 people claimed for this in 202/21, the increase would mean that the Council would incur additional costs of circa. £1,465
Glasses (single lens)	£25.00	£40.00	For these it is difficult to find average prices.
Glasses (Varifocals)	£60.00	£65.00	

Other changes include:

- Simplifying the language used
- Adding in information on how employees can claim tax relief from the Government if they do any working from home
- Updating the guidance information on the intranet
- Removing reference to historic processes

Following the approval of this new policy, work will need to be undertaken to review some of the claims processes in SAP.

## **5.0 Comments from Trade Unions**

- 5.1 Unison: The method we have used to get to an agreed policy has worked well and has allowed for Trade Union expertise to improve the policy, we welcome this inclusive way of working going forward. The focus on reducing the Council's carbon footprint is clearly important to us all, however it is important that this is matched in changed ways of working to allow this policy to achieve its aims in a way that does not just focus on the actions of individual workers. If we feel that the policy is not working as planned, we reserve the right to come back to personnel committee.

## **6.0 Comments from the Director of HR/OD**

- 6.1 No further comments to add.

## **7.0 Conclusion**

- 7.1 Personnel Committee are requested to approve the new Staff Travel Policy and the changes to the Expenses Policy.

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# Travelling Sustainably

## Staff Travel Policy

<b>AUTHOR</b>	Human Resources and Organisational Development
<b>SCOPE</b>	This policy applies to: <ul style="list-style-type: none"> <li>employees of Manchester City Council</li> </ul>
<b>PURPOSE</b>	The purpose of this policy is to: <ul style="list-style-type: none"> <li>create a culture of environmental responsibility when it comes to in-work travel and behaviours as set out in the <a href="#">Employee Code of Conduct</a> with a view to reducing carbon emissions through in-work staff travel.</li> </ul>
<b>APPROVAL</b>	N/A - document in consultation only
<b>REVIEW</b>	The policy will usually be reviewed every 3 years but may be reviewed sooner if there are changes to legislation or statute; agreement of new national terms and conditions of service or Government Policy; organisational change; or resulting from changes agreed through Trade Union Consultation.

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## 1. INTRODUCTION

The [Our Manchester Strategy](#) sets out our responsibility to reduce our carbon footprint, and staff travel is one of the ways we can do this. The [Manchester City Council Climate Action Plan](#) outlines the scale of the climate challenge and sets a target of reducing emissions from staff travel in work<sup>1</sup> by 100 tonnes CO2 per year.

Our ability to serve the residents of Manchester depends on us being able to visit their neighbourhoods and homes. However, the way we choose to travel affects the health of our residents through pollution from our emissions.

We have written this policy during a global pandemic, which has transformed the way we work and resulted in a reduction in Carbon Emissions of 63% due to the reduction in travel. We have found new ways to work through virtual meetings and remote working on a large scale. This now gives us the opportunity to think about the reasons we travel.

This is not just about how we travel in work; it is also about the impact of our wider behaviours in work. Some of the work we are doing to raise awareness and reduce emissions includes:

### Carbon Literacy Training

Book on to carbon literacy training and learn about carbon emissions. The training is mandatory for all employees and is a really important tool to ensure that our workforce is well informed about the climate emergency. It covers the impact our day to day lives have on the environment and what we can do to reduce this impact. This training is delivered virtually but in person sessions can be arranged.

### Office Practices

- |              |  |
|--------------|--|
| Printing     | <ul style="list-style-type: none"> <li>➤ Avoid where possible</li> <li>➤ Print on both sides</li> <li>➤ Use recycled paper</li> <li>➤ Only print the pages you need</li> <li>➤ Do not print in colour</li> </ul>   |
| Digital      | <ul style="list-style-type: none"> <li>➤ Use electronic files rather than paper</li> <li>➤ Do not use coloured backgrounds if it is likely to be printed</li> <li>➤ Reduce the amount of emails/junk mail you receive and send-even digital communications have a carbon footprint</li> <li>➤ Fully shut down computers and turn off computer monitors at the end of each day</li> </ul> |
| Reduce Waste | <ul style="list-style-type: none"> <li>➤ Turn lights off when leaving rooms</li> <li>➤ Reduce the use of single use plastics (SUP)</li> <li>➤ Re-use containers/packaging</li> <li>➤ Recycle waste where possible</li> </ul>   |

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<sup>1</sup> There is a separate action looking specifically at influencing staff travel behaviours for the commute.

- Encourage others to recycle where possible

### **Sustainable Commute**

The Manchester City Council Climate Action Plan 2020-2025 recognizes that the Council has indirect emissions which we do not have direct control over but are a consequence of our activities.

Staff commuting falls under this category. To support staff to commute sustainably we have secured a range of corporate discounts for public transport along with providing facilities to support staff to try more active modes such as cycling and walking. Information about these discounts is available on the [intranet](#).

## **2. PRINCIPLES**

The principles of this policy are:

1. Reduce in-work travel where possible
2. Increase the use of environmentally friendly transport such as public transport and active travel<sup>2</sup> where travel is necessary
3. Reduce the impact of road travel through:
  - a. Route planning
  - b. Using locations that reduces the distance people need to travel
  - c. Bundling up journeys
4. Reduce the use of private vehicles by using tools like car club<sup>3</sup>
5. Restrict air travel
6. Encourage and support the use of sustainable travel modes<sup>4</sup> to and from the workplace

## **3. SCOPE**

This policy should be used to inform decisions on in-work travel. The policy encourages all Council employees to use the most environmentally friendly mode of transport that is practical and accessible<sup>5</sup> for their journey.

Further guidance on using each of the modes detailed can be found on the [intranet](#).

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<sup>2</sup> Active travel is used to describe activities such as walking, cycling, wheeling and scooting etc.

<sup>3</sup> Car club vehicles are generally low emission vehicles and reduce the need for individual car ownership

<sup>4</sup> Walking, Cycling, Bus, Tram, Train

<sup>5</sup> Accessible in this policy context means a mode of travel that is most suitable for a disabled employee's needs, even in circumstances where that is less environmentally friendly. Disabled employees with reduced mobility, limited vision or hearing, chronic health conditions or mental health conditions may need to travel by cars or taxis. Some disabled staff can or may be able to use public transport, cycle or walk, either on a permanent or temporary basis, i.e., if their condition fluctuates, but managers should always be guided by what works best for the disabled employee and ensure that reasonable adjustments are made wherever needed

#### 4. EQUALITY

Individual circumstances and personal safety should be considered when making decisions on how to travel:

##### Personal Circumstances

There are many circumstances which will affect an individual's ability to use all or some of the modes laid out in this Policy. These may include, but are not limited to disability, pregnancy, childcare and caring responsibilities.

##### Reasonable Adjustments

Reasonable adjustments should be made for disabled employees to enable them to use accessible travel suitable for their own needs. Carers will also need to be supported to use the mode of travel that best enables them to undertake their caring responsibilities for example a carer may need access their own vehicle through the working day.

##### Personal Safety

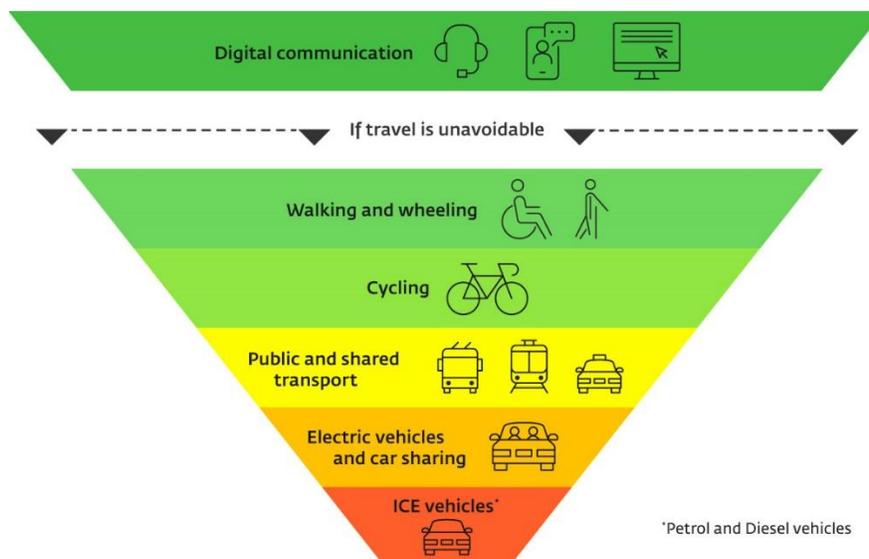
Our employees personal safety is paramount. Circumstances which may affect the perceptions of safety may include lone working, shift times and weather conditions. Reasonable adjustments should be made to enable employees to make decisions based on safety.

#### 5. USING THE POLICY

We all need to change how we think about travel. When deciding when and how to travel, think about whether the journey is necessary and the sustainability of the mode.

If you are travelling outside of your usual routine, then you must ask your manager for approval before incurring any expenses.

We have listed the travel options in order of the environmental impact that they have, with the most environmentally friendly listed first:



**Is travel necessary?**

We have a range of tools that reduce the need for in-person meetings. This includes phone, 8x8, email and video conferencing<sup>6</sup> via Teams (or Zoom for some services).

Always think about how accessible these tools are for those who will attend the meeting. You can find guidance on inclusive communication on the [intranet](#).

If a meeting needs to be held in-person, could it be organised for a day when everyone is likely to be in the same location anyway?

**Active Travel**

This is all about getting you from A to B in ways that do not use any carbon.

Walking is a great way to travel as it gives you thinking time and means you are moving which is great for both physical and mental wellbeing. We ask staff to prioritise walking/wheeling for any journey that is under one mile.

Cycling is also an energy efficient means of transport for those who feel confident on a cycle. We ask staff to consider cycling for any journey that is under three miles and where there is an accessible route, and the staff members feels comfortable to do so. Cycle users can also claim an allowance for in-work travel, rates can be found on the [intranet](#).

We are committed to creating opportunities to enable staff to try out cycling in a safe environment and will continue to promote training courses and events across the city.

In Spring 2022 Manchester City Council will be deploying 12 eCargo bikes and 3 trailers as part of our corporate fleet along with a city-wide hire scheme. If departments are interested in trailing the use of an eCargo bike for service delivery, demonstrations will be available from the host MCC departments (parks, cemeteries, leisure, south neighbourhoods and integrated services) and there will be an opportunity for short-term hire via the loan scheme.

**Public Transport**

**Bus/Tram:** Manchester has a wide and accessible bus and tram network. The use of public transport is encouraged for in-work travel where it is accessible and it is often cheaper and quicker than using a taxi. Where an employee already holds a season ticket/pass, and no further expense is incurred because of the journey, no expenses can be claimed.

Where journeys are infrequent and an additional expense is incurred, a claim can be made through the expenses form in MiSelf ensuring that the claimants' responsibilities, as laid out in the staff expenses policy, are adhered to.

Where services and teams are making regular journeys that could be made by Metrolink, annual season tickets can be purchased via the teams cost centre for use by a team. Monthly season tickets can be purchased for use on bus and Metrolink in the form of the system one travel cards. To organise this, please contact: [letstalk@manchester.gov.uk](mailto:letstalk@manchester.gov.uk)

**Rail:** Rail travel is one of the most environmentally friendly modes of travel for long journeys.

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<sup>6</sup> There is still a carbon cost for virtual meetings.

Standard class rail travel is more energy efficient than first class due to the amount of space dedicated to first class seats.

First class will only be available when standard class does not meet the needs of the employee.

Rail tickets must be booked as far in advance as possible using the [agreed process](#). For urgent travel, tickets can be purchased outside of the process and a retrospective claim can be submitted.

### **Car Club**

Car club cars, on average, emit 43% less carbon dioxide from emissions than the average UK car and reduce the need for individual car ownership. The Council is partnered with Enterprise Car club to give staff a flexible way to hire a car for a few hours for in-work travel. It can also work out cheaper than casual mileage if the average miles travelled per hour are 13 or more.

Where a service is based at one site, but employees may on occasion have to use their own car or a taxi for in-work travel then the car club is a flexible way to access a car. There is on street provision around Manchester. If a service feel that they would benefit from the car club but there are no vehicles located in the immediate vicinity then applications can be made to arrange for a car club vehicle to be situated closer by contacting: [letstalk@manchester.gov.uk](mailto:letstalk@manchester.gov.uk)

Car club bookings must be made with an approved cost centre number input into the memo field. For more information visit the [dedicated intranet pages](#).

### **Private Car**

**Own Car:** Where it is necessary to use your own vehicle for your role and car user status has been granted, staff are asked to:

- Manage your diary to try to group trips together, reducing the number of individual journeys to be taken in the car.
- Check if other colleagues are making a similar journey and travel together if possible and accessible.
- Travel outside of peak times where possible to reduce congestion.
- Optimise route planning and meeting locations to reduce miles travelled. When considering meeting locations, accessibility of those invited should be considered. Disabled employees will be supported to make travel and location decisions based on their accessibility needs.
- Adopt [ecodriving techniques](#) for the best fuel efficiency.

Only authorised users can claim reimbursement at [agreed rates](#).

If you incur additional charges (such as parking/toll roads) when working, these will be reimbursed when you provide a receipt or other evidence of payment. Under no circumstances will motoring offences or parking fines be reimbursed. Full guidance on how car users can make claims is available in the [Car Allowance Guidance Note](#).

You can find more information on the eligibility criteria for car users on the [intranet](#).

### Reviewing Car User Status

It is a manager's responsibility to review MOT and insurance documents annually to make sure that the vehicle is roadworthy and business use is included on the insurance. In addition, managers must carry out an annual review of the payment of any car user allowance against the scheme criteria.

If the user fails to meet the [scheme criteria](#), then the allowance may be withdrawn. If the user is transferred to another post which does not require car user status, or it is deemed that they no longer require car user status to fulfil their duties then the allowance will also be withdrawn.

**Taxis:** Taxis should only be used for journeys where there is a specific need that needs accommodating. This could be:

- where there is no alternative mode available
- where it is more environmentally friendly due to the number of people travelling
- where it is the most accessible mode of transport for an employee and a [reasonable adjustment](#).

### Flights

Air travel is restricted to business-critical<sup>7</sup> cases. Given the carbon impact of air travel, this option should only be pursued for international travel, unless in exceptional circumstances. All air travel requires prior approval from the City Treasurer or Chief Executive.

All bookings will be economy class.<sup>8</sup> Business class flights may be booked on disability/medical grounds.

Benefits accrued as a result of official travel (for instance 'Air Miles') must not be used for personal travel.

## 6. TRAVEL EXPENSES

HMRC determine the travel expenses that employees can claim for and how these are determined depends on the classification of workplace and the employee's contractual relationship with that workplace.

For contractual purposes the office remains your permanent place of work even if you spend limited time there unless you are deemed a home worker in your contract.

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<sup>7</sup> Business critical is defined as the organisation having a contractual obligation to attend an overseas meeting/conference where air travel is the most accessible option. Business cases can be made for other overseas travel where our attendance would have a significant positive impact on the delivery of the city's strategic objectives.

<sup>8</sup> Due to the increase in efficiency of the seating layout compared to emissions from business class seats i.e., more passengers per square foot.

If you need or are required to travel from home or your usual Council site to another site further away than your normal commute<sup>9</sup>, then you can claim travel expenses only for the additional travel incurred. If you choose to travel to a temporary place of work e.g., for convenience, then this should be treated as a normal commute and no travel expenses can be claimed. This principle does not apply if you are choosing to travel to a temporary place of work for accessibility reasons due to a disability.

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<sup>9</sup> To your permanent place of work

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# STAFF EXPENSES POLICY

<b>AUTHOR</b>	Human Resources and Organisational Development
<b>SCOPE</b>	<p>This policy applies to:</p> <ul style="list-style-type: none"> <li>• employees of Manchester City Council</li> <li>• employees on secondment outside of the council but who remain on Manchester City Council terms</li> </ul> <p>This policy does not apply to:</p> <ul style="list-style-type: none"> <li>• employees in their probationary period</li> <li>• agency workers, consultants, self-employed or casual workers</li> <li>• school employees</li> </ul>
<b>PURPOSE</b>	<p>The purpose of this policy is to:</p> <ul style="list-style-type: none"> <li>• provide guidance on what you can claim expenses for and how to claim it.</li> </ul>
<b>APPROVAL</b>	N/A - document in consultation only
<b>REVIEW</b>	The policy will usually be reviewed every 3 years but may be reviewed sooner if there are changes to legislation or statute; agreement of new national terms and conditions of service or Government Policy; organisational change; or resulting from changes agreed through Trade Union Consultation.

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## 1. CRITERIA

To be eligible to claim expenses, the claim must be for additional expenses incurred as a direct result of being employed on Council business or for other expenses that have been agreed to be reimbursed by the Council, for example flu vaccinations.

As per existing guidance, where no additional expense is incurred, no reimbursement is due. For example, expenses incurred will only be considered “additional” if the employee would not have reasonably expected to have incurred the expense if they had been in work e.g., buying a sandwich for lunch is not additional and having a three-course meal instead of a sandwich is unreasonable.

In relation to travel, the mode should always be driven by the staff travel policy and all business travel and accommodation must be booked through the Council’s formal contracts unless there are exceptional circumstances.

## 2. ROLES AND RESPONSIBILITIES

### Claimants Responsibilities:

- must be aware of this policy and associated procedures
- are required to submit claims promptly
- must be in possession of original receipts
- receipts should be retained for a period of 25 months where possible for audit purposes

Where claims are necessary as part of the employee’s role in the Council, claims must be submitted monthly i.e., not several claims per month.

The employee must certify the claim as accurate and incurred as an additional expense in line with business needs.

### Manager’s Responsibilities:

- check whether claim amounts are reasonable, making a judgement based on the type of claim and the reasons for claiming
- reject all claims where they do not meet the criteria
- seek advice from the Employee Life Cycle Team if there are questions about the accuracy and validity of any claim

Managers should implement a process to enable them to minimise the risk of error or omission, and ensure good financial management including budgetary control.

### 3. EXPENSES

#### Overnight Accommodation

Unless unexpected, overnight accommodation must be booked through the [approved contractor](#). It is not expected for officers to carry out research into accommodation rates or make their own arrangements. The approved contractors are obliged to provide the most cost-effective solutions to individual accommodation requirements, whilst taking account of employees' needs, e.g. disability requirements.

In an emergency/where accommodation is required unexpectedly employees should make efforts to inform their manager of the situation and attempt to find accommodation at a reasonable rate.

#### Subsistence Allowance

Meal costs are an employee's responsibility whether at or away from their work base. Subsistence allowance is intended to meet the extra costs for additional meals that are purchased when an employee is away from their normal workplace on official business, for example an evening meal.

To claim subsistence allowance (which includes snacks, soft drinks, and beverages, but not alcohol) an employee would normally be expected to be away from their base for more than 10 hours. Claims should be for the actual receipted cost of subsistence, up to the [maximum limit](#). Optional tipping will not be reimbursed.

Subsistence can also be claimed if the employee stays away from home overnight on official business. It covers a period of 24 hours to meet the actual costs of the employees' meals and drinks - excluding alcohol. This allowance will not be paid where meals are provided by a third party/at the temporary place of work or event and there has been no additional cost.

Claims will need to be supported with original receipts showing actual expenditure. Failure to produce receipts will result in the claim not being approved.

In all situations, reimbursement will be made through the Corporate Shared Service Centre. All expense claims will be paid directly through the claimant's bank account (as held on their payroll record) and as the payment relates to a reimbursement of actual expenditure, the amount payable will be non-taxable.

The Council have determined the [subsistence rates](#), which are intended to be the maximum amount that an employee may claim and therefore in some circumstances may only represent a contribution towards the actual subsistence expenditure occurred.

There may be circumstances where these rates, with approval from the relevant Head of Service, may be increased to be more appropriate. For example, in some countries the cost of subsistence is much higher than the UK, therefore a reasonable increase may be agreed to limit the contribution the employee may have to make whilst on Council business. Permission to increase the allowance must be sought and granted from the relevant Head of Service prior to any expenses being incurred.

### **Excess Travel**

The purpose of excess travel expenses is to provide recompense for the disruption an enforced change of work location may cause.

Claims can only be made where there is an enforced change to work location. Details on circumstances where this will apply and amounts staff are eligible to is available [on the intranet](#).

### **Occasional Working from Home/Permanent Home Working**

Where an employee works from home, whether this be a permanent arrangement or as part of working flexibly, expense claims will not be considered for internet connection/broadband and/or utilities - including landline or mobile telephone charges. You can [claim tax relief](#) from the government for expenses incurred because of home working.

### **Emergency Purchases**

For the purpose of this policy an “emergency purchase” is defined as a threat to public health, welfare or to comply with the Health and Safety Act. Emergency procurement will be limited to resources necessary to meet the emergency only.

Emergency procurement of resources will require advance authorisation by an appropriate manager to obtain the goods through a route other than established and agreed formal procedures, i.e. emergency purchases may be claimed through the employee expenses policy as long as they were approved in advance and were genuinely required as a result of an emergency.

### **Use of Council Purchase Card**

Some officers will have access to a purchase card, the possession of a purchase card does not exempt any officer from the requirement to comply with this policy in full. Purchase card spend is monitored and any purchases made which contravene this policy will be reported to the appropriate manager and/or internal audit as appropriate.

**WiFi/Internet Use (only whilst travelling)**

Employees are entitled to be reimbursed for the costs of WiFi / Internet Use charges whilst travelling for business purposes. Costs incurred must be authorised prior to purchase and will only be reimbursed when accompanied with a relevant receipt or evidence.

**Flu Vaccination**

Flu vaccinations protect employees and help to protect the vulnerable people they come into contact with. If employees are pregnant, age 65 or over, a carer or living with a long-term health condition they can receive a free flu jab from their GP.

For other employees, flu jabs are widely available through GPs, at pharmacies and even at supermarkets for a small cost. Depending on the likely scale of flu and the potential benefit of wide scale vaccination the Director of Public Health and Director of HROD may permit the reimbursement of the cost of a flu jab, up to an agreed amount, using the standard claims procedure.

**Eye Tests**

All employees are entitled to claim back a portion of the cost of eye tests and glasses every two years if they use Display Screen Equipment (DSE) for more than one hour a day for work purposes - unless a medical condition requires more frequent eye examinations and re-prescription. Information on contributions can be found on the [intranet](#).

**Professional Fees**

Professional fees will be reimbursed where membership is a statutory requirement or condition of employment with the Council.

**4. CLAIM PROCEDURE**

Claims for expenses must be submitted by the employee using either mi-self, or the off-line employee expenses form (only if they do not have access to mi-self).

The employee will need to show the original receipts to their line manager when submitting a claim. Receipts will then need to be retained by the claimant for a period of 25 months in case of audit by the HMRC or Internal Audit. The receipts should be retained in a logical monthly order.

Where employees are making an expense claim using the off-line employee expenses form, they will need to submit the form with the receipts attached.

Employees should be aware that it is their responsibility to obtain approval from their line manager before incurring expenses. Failure to do so may lead to the expense claim being rejected on the basis it was not authorised.

Retrospective claims for expenses which are over three months old from the date of the expense will not be reimbursed unless in exceptional circumstances, such as long-term sickness.

#### **5. REGULATORY REQUIREMENTS AND RESTRICTIONS**

The Council does not expect employees to spend their own money on behalf of the Council and these situations should be avoided wherever possible by using the agreed processes.

Claims for all expenses must be supported by receipts and must be reasonable. Where it is not possible to provide receipts or travel tickets an explanation must be provided on the claim form. Payment of expenses not supported by receipts will only be paid at the discretion of the manager responsible for authorising the claim.

Claims for items purchased using a credit card must be evidenced by the itemised payment receipt and not the total summary receipt.

Any employee knowingly making a false claim or failing to demonstrate value for money may face disciplinary action in accordance with the Council's disciplinary procedure.

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# Employee Expenses Policy

HR/OD

July 2015 (updated March 2018)



**MANCHESTER**  
**CITY COUNCIL**

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## Document Control

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## Introduction

- 1.1 The primary objective of this policy is to help ensure employees make responsible decisions for business travel and that where possible sustainable forms of transport are used. Guidance is provided separately to ensure that any claims are supported by clear, justified reasons for travel; sufficient evidence to enable reimbursement and are for additional expenses incurred only.
- 1.2 All expenditure for business travel should only be incurred in accordance with authorised business need. The key principle is that everyone should try to minimise the overall costs to the taxpayer, including the use of official time, fares and subsistence and this will in the majority of cases, mean using public transport.
- 1.3 National conditions of Service (Green Book) state:  

“Employees necessarily incurring additional expense in the course of their work in respect of travel, meals or overnight accommodation will be reimbursed approved expenses subject to appropriate evidence being produced.”
- 1.4 Authorisation for payment of claims will be based on whether the claim made is timely, reasonable and can be validated. It is the claimant’s responsibility to ensure that claims made are certified as legitimate additional expenditure.
- 1.5 The policy will include roles and responsibilities and regulatory requirements and restrictions. A supplementary guidance document to be used in conjunction with this policy is available on the Intranet.

## Scope

- 2.1 The policy applies to all employees of the Council excluding employees directly employed by schools. The policy also encompasses travel arrangements that may be made for service users as part of service provision.
- 2.2 All travel arrangements must be made through the Council’s approved travel contractors. Details of the current travel contractors can be obtained from the Council’s Corporate Procurement Team and are available on the Intranet.
- 2.3 The Council fully endorses the Government’s Sustainable Transport Policy. The Council’s own travel plan encourages all Council employees to use public transport and to consider the environmental impact of all journeys made.
- 2.4 The policy will be reviewed periodically to ensure that it remains effective.

## Criteria

- 3.1 To be eligible to claim travel or related subsistence expenses, the employee's claim must be for additional expense incurred as a direct result of being employed on City Council business away from their work place, taking into account that employees work flexibly from a number of locations. The general principle is that where no additional expense is incurred no reimbursement is due. Expenses incurred will only be considered "additional" if the employee would not have reasonably expected to have incurred the expense if they had actually been in work. For example, buying a sandwich for lunch is not additional and having a three course meal instead of a sandwich is unreasonable.

## Claim Procedure

- 4.1 Claims for subsistence/expenses should be submitted by the employee using either mi self, or the off-line Employee Expenses Form (if they do not have access to mi self).
- 4.2 The employee will need to show the relevant original receipts to his or her line manager when submitting a claim. Receipts will then need to be retained by the claimant for a period of 25 months in case of audit by the HMRC or Internal Audit. The receipts should be retained in a logical monthly order.
- 4.3 Where employees are making an expense claim using the off-line Employee Expenses Form, they will need to submit the form with the receipts attached.
- 4.4 Employees should be aware that it is their responsibility to obtain approval from their line manager before incurring expenses. Failure to do so will lead to the expense claim being rejected on the basis it was not authorised.
- 4.5 Retrospective claims for expenses which are over three months old from the date of the expense will not be reimbursed.

## Regulatory Requirements and Restrictions

- 5.1 All travel or subsistence expenditure must be approved in advance, and in the first instance by the appropriate line manager.
- 5.2 Business travel arrangements must be booked through the approved travel contractor. It is neither expected nor desirable that Council officers carry out research into fares to make their own travel arrangements as the approved travel contractors are obliged to provide the most cost effective solutions to individual travel requirements. Where a Council officer believes a fare could have been obtained more economically this should be reported to the Corporate Procurement Team.
- 5.3 The MCC Code of Conduct for Employees states the following "*Employees have a duty to use public funds in a responsible and lawful manner and in undertaking their duties,*

*they should strive for value for money for the local community and should try to avoid legal challenge to the Council.*” Any employee knowingly making a false claim or failing to demonstrate value for money may face disciplinary action in accordance with the Council’s disciplinary procedure.

- 5.4 All business travel and accommodation must be arranged through the Council’s formal contracts. However, it is recognised that there will be very exceptional occasions where Council Officers may need to arrange and pay for this themselves. Where an officer does need to make a claim, the official “employee expenses” claim procedure must be used. Where such arrangements are made any expenditure must be formally approved in advance by the appropriate line manager, together with the reason for departing from the standard procedure.
- 5.5 Claims for all expenses: rail, taxi, private cars, subsistence etc. must be supported by itemised receipts as evidence of actual payment of incurred expenses and must be reasonable. Where it is not possible to provide receipts or travel tickets for any reason an explanation must be provided on the claim form. Payment of expenses not supported by official receipts will only be paid at the discretion of the manager responsible for authorising the claim.
- 5.6 Claims for items purchased using a credit card must be evidenced and receipted by the detailed itemised payment receipt and not the total summary card payment receipt.
- 5.7 Optional tips and gratuities on bills which are given at the employee’s discretion will not be reimbursed by the Council.
- 5.8 The Council does not expect employees to spend their own money on behalf of the Council and these situations should be avoided wherever possible by using the agreed process.

## Travel Expenses

- 6.1 The Council is committed to providing excellent value for money, therefore employees should seek to minimise the cost of travel by avoiding the need to make business trips in the first instance but, where this is not possible, to use the most cost effective form of sustainable transport available.
- 6.2 All travel arrangements must be pre-booked through the official corporate contracts for travel. Details of current travel contractors can be obtained from the Corporate Procurement Team.

## 6.2.1 Rail Travel

All employees should normally use standard class rail travel. Rail is the preferred mode of travel for long distances. However, consideration should be given as to whether the journey is business critical or whether other options could be explored in order to avoid the need to travel at all.

Entitlements are standard rate fare at all times, using the best rate available. First class rail travel may only be used in the following exceptional circumstances and only then with prior approval of the appropriate Strategic Director:

- when the facilities provided in standard class do not meet business needs (such as there being no seats available for longer journeys, or where the adequacy of the seating available prevents the employee from carrying out their duties)
- if the employee is pregnant and cannot obtain a seated ticket
- if the employee is suffering from a temporary or permanent disability which means that standard class travel is unsuitable or there is a need to travel overnight and use a sleeping berth

Rail tickets must be booked, wherever possible, on a pre-booked, closed ticket basis as early as possible using the agreed contract/procurement process. Tickets for urgent rail travel when approved can be purchased outside of the agreed procurement process. A retrospective claim to recoup the costs incurred through the expenses process can then be submitted via mi people Self Service or the paper process for those staff without systems access.

On return journeys, if the employee needs to return at an earlier or later time than stipulated on the ticket, then the additional cost may be reclaimable in arrears via the employee expenses claim procedure.

## 6.2.2 Public Transport (including buses and Metrolink)

Employees who need to use public transport in the course of their duties may be able to claim for journeys incurred. Fares will be paid either via the employee expenses claim procedure (or in limited circumstances via petty cash if this is available to the service) or by using a bus ticket purchased by the Council. There are HMRC implications with the use of bus tickets purchased by the Council and these tickets must only be used in conjunction with work related activities and cannot be used for personal use (to be confirmed by the user in writing).

This does not apply to employees who use their own personal season ticket/monthly pass to cover journeys by Metrolink or bus as there is no additional cost to the ticket holder. Therefore, if their own season ticket/monthly pass is used to travel in connection with work related duties, no additional payments will be made. The only exception will be

where an employee agrees to purchase an extra zone in order to travel outside of their normal season ticket/monthly pass area. Employees should obtain approval from their line manager before incurring any such expense and the reimbursement paid using the appropriate financial processes. Records of these decisions must be retained and referred to as part of any claim. Zone passes should be purchased and reclaimed providing evidence of the additional costs incurred.

### 6.2.3 Taxis

Employees who need to travel to a particular destination may, by prior agreement, arrange for a taxi to be provided under the Council's corporate taxi contract. However, taxi journeys should be authorised and agreed in advance by the employee's line manager by using a "Taxi Authorisation Form." Please refer to the Intranet for details of the contracts currently in place and the procedures to be used.

Only in exceptional circumstances will employees be reimbursed for the cost of a taxi or hire car where it is not possible to book a taxi using standard procedures, reimbursement will be made via the employee expenses claim procedure.

Taxis should only be used in the following circumstances:

- when no other method of public transport is available (e.g. when travelling at night)
- when carrying heavy official papers, equipment /baggage, or for reasons of personal safety
- if you are unable to use public transport because of pregnancy or a temporary or permanent disability (this particularly applies to short journeys)
- if there would be an overall cost saving including any claim for subsistence or to ensure journey connection or arrival times
- where public transport is sporadic or unreliable
- if it is more cost effective when travelling in a group

### 6.2.4 Car Allowance

Car allowances will only be paid to authorised Casual Car Users. Employees required to use their own motor vehicles for the efficient performance of their duties will need to seek authorisation to becoming a "Casual Car User" in order to be eligible to be paid mileage for their business travel. The mileage rate is that authorised by the Council. Car allowance is only payable where it can be proven that using this means of transport provides savings over any other means of transportation.

Mileage must be claimed through the vehicle allowance claim procedure and verified by the relevant line manager. The claim requires specific details of journeys such as (from where) and (to where) (specific addresses are required and “from home “will not be considered sufficient). Confirmation of why mileage has been claimed and public transport not used must be included.

Where it is deemed more cost effective to travel by public transport but the employee chooses to use their own car to make the journey (assuming they have the relevant insurance), then the cost claimed and reimbursed by the employee must not exceed the sum of the most cost effective means of public transport. For clarity and to prevent any misunderstanding, if the most cost effective means of transport is for example by rail (and the fare is £5.00) but the employee wishes to use their own car and the mileage for the journey is equivalent to £10.00, then the employee may only claim for and be reimbursed £5.00, the cost of the rail fare.

The Council supports government environmental initiatives and encourages car sharing among its employees whilst travelling on business using their own vehicles. In addition the Car Club offers cars which can be used for business journeys, the Car Club option is both cost effective and convenient and details of this scheme can be found on the Intranet.

### 6.2.5 Parking Fees and Tolls

Employees are entitled to be reimbursed for the costs of unavoidable expenses for parking and tolls (including road tolls and river ferries), upon production of suitable receipts. Planned journey routes prior to travel should be considered, avoiding these costs where economically possible to do so.

### 6.2.6 Air Travel

Air travel will only be considered for long distance travel and only then, when it is a business critical case and it is considered that this mode of transport represents value for money and ensures a shorter travel time. However, all travel by air must be in economy class and agreed by the relevant Strategic Director and booked in advance through the agreed contractor.

Benefits accrued as a result of official travel (for instance ‘Air Miles’) must not be used for personal travel. These should be declared and used to offset the cost of future Council official business journeys.

### 6.2.7 Overnight Accommodation

Overnight accommodation must be booked through the approved contractor. It is neither expected nor desirable that Council officers carry out research into accommodation rates to make their own arrangements. The approved contractors are obliged to provide the

most cost effective solutions to individual accommodation requirements, whilst taking account of the employees' requirements, i.e. disability requirements.

## 6.2.8 Subsistence allowance

As a general rule, meal costs are an employee's responsibility whether at or away from their work base. Subsistence is intended to meet the extra costs for additional meals that they necessarily incur when they are away from their normal workplace on official business.

Employees are entitled to claim subsistence if they are away from their normal workplace on official business and necessarily purchase a meal or meals (including snacks, soft drinks and beverages, but not alcohol). To claim subsistence allowance an employee would normally be expected to be away from their base for more than 10 hours. Claims should be for the actual receipted cost of subsistence, up to the maximum limit. Optional tipping will not be reimbursed and therefore must not be claimed. Subsistence cannot be claimed where the meal or meals are provided by a third party at no cost to the employee.

Subsistence can also be claimed if the employee stays away from home overnight on official business. It covers a period of 24 hours to meet the actual costs of the employees' meals, drinks (excluding alcohol), and accommodation. This allowance will not be paid where meals are provided for at the temporary place of work/event and there has been no additional cost.

Claims will need to be supported with receipts for actual expenditure incurred. Failure to produce receipts will result in the claim not being approved and processed.

In all situations, reimbursement will be made through the Corporate Shared Service Centre. All expense claims will be paid directly through the claimant's bank account (as held on their payroll record) and as the payment relates to a reimbursement of actual expenditure, the amount payable will be non-taxable.

The Council have determined a number of [subsistence rates](#), which are intended to be the maximum amount that an employee may claim and therefore in some circumstances may only represent a contribution towards the actual subsistence expenditure occurred.

## 6.2.9 Mobile Phone Charges

If you find you need to use your personal mobile phone in the course of carrying out your duties with the Council then you can claim for reasonable charges incurred. For any usage claimed you will need to provide proof of associated costs in order to assess the validity of the claim. Where possible, please check with your line manager first if you know you are going to be away from your work location and feel you may need to claim for mobile phone charges. They may be able to provide a shared Council mobile phone if

this is a regular occurrence and you do not have a mobile phone assigned to you as part of your role.

## 7.0 Other Types of Business Expenditure

The following expenditure types, although not specific to this policy are included for reference.

### 7.1 Home Working

In the event of an employee being approved for home working and a broadband connection and/or office equipment is required, these expenses should be managed in accordance with the Home Working Code of Practice and approved, in advance in the first instance by the appropriate line manager using established and agreed, formal procedures. No payments will be made through the employee expenses process.

### 7.2 Emergency Purchases

For the purpose of this policy an “emergency purchase” is defined as a threat to public health, welfare or to comply with the Health and Safety Act. Emergency procurement will be limited to resources necessary to meet the emergency only. Emergency procurement of resources will require advance authorisation by a line manager to obtain the goods through a route other than established and agreed formal procedures, i.e. emergency purchases may be claimed through the employee expenses policy as long as they were approved in advance and were genuinely required as a result of an emergency as defined above. Poor planning does not constitute an emergency.

### 7.3 Use of City Council Purchase Cards.

Some Council Officers will have access to a Purchase Card to facilitate the efficient discharge of their duties. The possession of a purchase card does not exempt any Council officer from the requirement to comply with this policy in full. Purchase card spend is monitored and any purchases made which contravene this policy will be reported to the appropriate Line Manager and / or Internal Audit as appropriate.

### 7.4 WiFi / Internet Use (only whilst travelling)

Employees are entitled to be reimbursed for the costs of WiFi / Internet Use charges whilst travelling for business purposes. Cost incurred must be authorised prior to purchase and will only be reimbursed when accompanied by the relevant receipt.

### 7.5 Flu Vaccination

Flu vaccinations not only protects employees, they also help to protect the vulnerable people they come into contact with and members of the public. If employees are pregnant, age 65 or over, a carer, or living with a long term health condition they can receive a free flu jab through their GP.

For other employees, flu jabs are widely available through GPs, at pharmacies and even at supermarkets for a small cost. Dependent on the likely scale of flu and potential benefit of wide scale vaccination the Director of Public Health and Director of HROD may permit the reimbursement of the cost of a flu jab, up to an agreed maximum amount, using the standard expenses process.

## Roles and Responsibilities

### 8.1 Claimant/Employee

Employees should be aware of this policy and procedure and ensure that any potential claim must be pre authorised before incurring the costs. Employees are required to submit claims promptly. Claims must be supported by official, original receipts. Receipts should then be retained by the employee for a period of 25 months in case of audit by the HMRC or Internal Audit. The receipts should be retained in a logical monthly order.

Where such claims are necessary by virtue of the employee's role in the Council, claims must be submitted on a monthly basis only i.e. not several claims per month (with the exception of any low value claims that cannot be accumulated to the collective value of £10).

The employee must certify the claim as accurate and incurred as an additional expense in line with business need.

In respect of the purchase of travel passes for work purposes these must be purchased by the Council through standard processes unless the claim is for purchasing additional zones (see earlier in the policy document).

### 8.2 Managers

Managers are responsible for ensuring the policy is adhered to within their teams and for any claims that they are asked to approve. Managers are also responsible for reviewing and approving travel arrangements within their areas of responsibility and should incorporate the principles contained within this policy into their decision making and business planning.

Managers must check whether claim amounts are reasonable, making an informed judgement based on the type of claim and the reasons for claiming. Claims must be rejected where they do not meet the Council's criteria. Advice should be sought from the [Employee Life Cycle](#) Team if there are questions about the veracity of any claim.

Managers should implement an assurance process to enable them to minimise the risk of error or omission, and ensure good financial management including budgetary control.

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