

Guidance on Travel and Subsistence

Can I claim expenses?

- If you need to travel for AEP business, you can claim those costs back.
- Eligible expenses are outlined in the Members Handbook- check **Appendix 18** to see what can be claimed.
- These costs should always be appropriate for the trip and offer good value for money.
- You should always consider alternatives to reduce your travel & accommodation costs.

Expenses you can claim

- Public Transport - such as train, bus, air fares - check Handbook, **Appendix 18** to see what can be claimed
- Car and Mileage - You can be reimbursed at a rate determined periodically by the Honorary Treasurer or by the NEC (the claim form calculates the total automatically).
- Subsistence - you can claim the cost of food, non-alcoholic drinks & accommodation when travelling on AEP business. Check **Appendix 18** to see what can be claimed.

Expenses you cannot claim

- Non-business travel or unnecessary, unapproved extended accommodation stays.
- Alcohol
- Tea and Dinner on the same day.
- Unreasonable travel options
- Where dinner is included for attendees, no claim for dinner can be made if attendees decide to make alternative arrangements for dinner.

So you are attending an AEP conference/event/meeting? What do you need to do?

Make sure you have received official confirmation of your place or attendance.

If appropriate, check if accommodation has been booked for you. Will you need any additional nights? If so, you must enquire about the options available to you and gain approval for the additional expense.

Start looking at travel options and book early to get best prices. Remember to use the most cost effective means of travel. Travelling by train enables you to work, making the most of your time!

When booking rail fare, do not use travel services like the **Trainline** as they charge a booking fee!

Complete a claim form and email this to Liz@aep.org.uk with appropriate receipts and in a timely manner. Supply sufficient information on the reasons for your claim and the amounts claimed.

You are required to provide proof of the expenses incurred. Claims may be delayed or even disallowed if not supported by valid receipts or other evidence.

Where dinner is included for attendees, you will not be able to reclaim the cost of a dinner if you decide to use an alternative venue.

We hope you enjoy your attendance!

Accommodation

(NB if the cost of accommodation needs to exceed these allowances, prior authorisation should normally be sought from the Hon Treasurer before booking)

- Room only accommodation **£145** per night (normal **maximum** allowance) apart from the following where necessary:
- **Friday night in London** where the maximum is **£173** per night
- **Mid-week in London, Cardiff, Belfast & Edinburgh** where the maximum is **£212**

Breakfast

- Maximum of **£12**

Lunch

- Maximum of **£12** (see expenses you cannot claim)

Tea

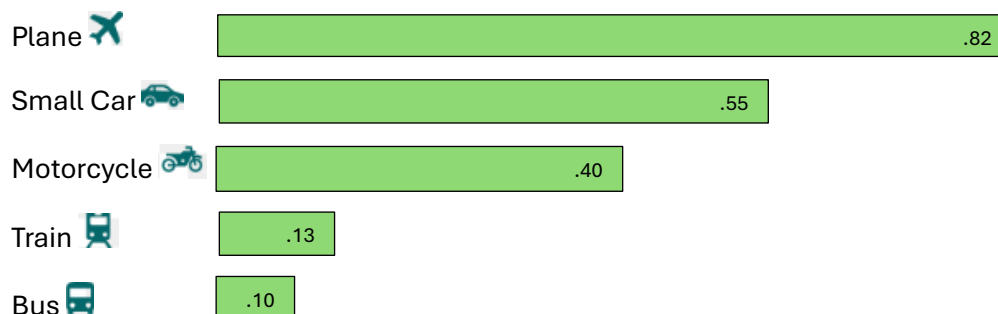
- Maximum of **£12** (A member may not claim the costs of **both** 'Tea' and 'Dinner' for the same day)

Dinner

- Maximum **£34** (or actual cost of standard meal necessarily taken on the train - see expenses you cannot claim)

Remember: The above are maximum rates and your support in achieving value for money will be greatly appreciated!

Do you know how many pounds of CO2e is emitted per passenger per mile?



One very good reason to consider your mode of travel you choose.

Filling in your claim form....

- Please **read the full guidance** which can be found in the [Members Handbook](#) (Appendix 18) to ensure that your claim is aligning with the guidance.
- The claim form should remain **formatted as an excel** file.
- Receipts should be submitted as a PDF file where possible.
- Each meeting/event should be submitted on a separate claim form (unless the journey incorporates several meetings/events)
- Travel by aircraft will normally require prior authorisation.
- Include any additional information in the box provided to support the claim such as reasons for travel, the need for accommodation etc.

GUIDANCE NOTES ON CLAIMING EXPENSES

Members are required to provide proof of the expenses incurred wherever possible. Claims are likely to be disallowed if not supported by valid receipts or other evidence. Full guidance for claiming expenses can be found in **Appendix 18 of the AEP Members' Handbook** but the following information has been included for your assistance.

Travel Expenses

Reimbursement of travel expenses may be claimed in respect of journeys that are **necessarily** and **primarily** undertaken on Association business (*i.e. not for those undertaken primarily for a member's personal reasons or in the course of his/her own business or employment*). Where a journey involves significant duties for an employer or another organisation, the member should seek to recover those travel expenses, or an appropriate proportion, from the employer/organisation concerned wherever this is feasible.

Subject to the restrictions in Appendix 18, the actual cost of travel by **public transport** (i.e. bus, coach, tram, taxi/cab, train, underground train, and ferry/hovercraft) may be claimed. The actual cost of a train fare will be reimbursed up to the maximum of the Standard Open Return fare applicable for the journey at the time. Travel by aircraft will normally require prior authorisation by designated AEP officers.

Accommodation Expenses

The actual and full cost of the accommodation will be reimbursed, up to the maximum amount shown overleaf, where the member undertakes duties on behalf of the Association at a location and at a time such that it would be unreasonable for the member either to travel from, or return to, his/her home (or current place of residence) on the same 'business day'. Accommodation expenses are not payable in circumstances where a member stays overnight in the home of a relative or friend.

Subsistence Expenses

The reasonable cost of meals and refreshments necessarily taken whilst a member is engaged on Association business will be reimbursed.

Breakfast

A member may claim the cost of a breakfast when he/she:

- i) Stays overnight in temporary accommodation in the circumstances described above (although the cost will usually be included in, and reimbursed as part of, the accommodation allowance), or
- ii) Is away from home at or before 7.00 am on Association duties, and is engaged on such duties (including travelling to or from the place of business) for more than 3 hours on that day including the period 7.00 am – 9.00 am.

Lunch

A member may claim the cost of a lunch when he/she is undertaking Association duties away from home (including travelling to or from the place of business) for a time exceeding 4 hours including the period 12 – 2 pm.

Tea

A member may claim the cost of a tea when he/she is undertaking Association duties away from home (including travelling to or from the place of business) for a time exceeding 4 hours including the period 3 – 6 pm.

Dinner

A member may claim the cost of a dinner when he/she:

- i) Is undertaking Association duties away from home (including travelling to or from the place of business) for a time **exceeding 4 hours and ending after 8 pm**.
- ii) Stays overnight in temporary accommodation in the circumstances described above and is **necessarily away from home from 7.00 pm onwards** on that night.

NB: A member may not claim the costs of **both** a 'Tea' and a 'Dinner' for the same day.

Advisory Note

Members should refer to Appendix 18 of their Handbook for full details of circumstances under which expenses may be incurred and reimbursed. In the event of doubt or ambiguity of rules, the decision of the Honorary Treasurer or the National Executive Committee will be final. Allowance rates are reviewed periodically – **claims will be reimbursed only at the allowance rates in force at the time expenses were incurred**.