



West Hampshire
Clinical Commissioning Group

TRAVEL AND EXPENSES POLICY

Version 3.3

Subject and version number of document:	Travel and Expenses Policy Version 3.3
Serial Number:	HR/028/V3.03
Operative Date:	22 July 2019
Author:	South, Central & West Commissioning Support Unit (SCW CSU) Senior HR Business Partner/ HR Manager
CCG Owner:	Chief Officer
Links to Other Policies:	<ul style="list-style-type: none"> • Lease Car Policy • Local Anti-Fraud, Bribery & Corruption Policy • Conduct, Performance, Grievance & Absence Management Policy: Disciplinary Procedure • Organisational Change Policy • Relocation Guidance and Procedure • Health and Safety Policy • Corporate Emergency Preparedness, Resilience & Response Policy: On Call Policy
Review Date	April 2020
For action by:	All West Hampshire CCG Employees
Policy Statement:	The purpose of this policy and procedure is to outline the rules set out by the Clinical Commissioning Group for the reimbursement of travel and expenses that are necessarily incurred by any individual engaged on business approved by the CCG.
Responsibility for dissemination to new staff:	Line Managers
Mechanisms for dissemination:	All new and revised policies are published on the CCG website and are promoted through the CCG staff newsletter.
Training Implications:	All employees of West Hampshire CCG will be made aware of this policy as part of the induction process.
Further details and additional copies available from:	Website: https://westhampshireccg.nhs.uk/document-tag/hr-policies/
Equality Analysis Completed?	Yes (attached)
Consultation Process:	Heather Hauschild, Chief Officer Staff Side Representative Policy Sub Group Local Counter Fraud Service Equality and Diversity Lead Corporate Governance Committee (now Finance & Performance Committee)
Approved By:	Policy Sub Group

Date Approved:	16 May 2018
-----------------------	-------------

Website Upload:

Website	Location in FOI Publication Scheme	https://westhampshireccg.nhs.uk/document-tag/hr-policies/
Keywords		

Amendments Summary:

Amend No	Issued	Page(s)	Subject	Action Date
1	21 Oct 14	11, 21 and 22	Amend section 6.1 and registration checklist. Addition of appendix re expense claim guidance	20 Oct 14
2	9 Sept 15		Amend section 6 re on-line claim forms	9 Sept 15
3	1 Apr 16	7, 8, 10,12	Policy now includes lay members / clinicians on A4C contracts. To clarify that claims for subsistence should also be made via E-Expenses on the 3 rd working day of each month. Remove the requirement for an annual audit.	1 Apr 16
4	May 17	7, 10 and 17	Policy now explicitly states it applies to interim members of staff and clarifies Lay Members not being Agenda for Change employees. Addition of Eye tests and glasses category and claimable amounts; addition of on-call category on e-expenses. Updated eligibility rates for travel expenses	24 Apr 17
5	Feb 18	2 and 13	Amend references to Whistleblowing & Concerns Policy to Conduct, Performance, Grievance & Absence Management Policy.	9 Feb 18
6.	Apr 18	13	Minor changes to clarify wording in relation to insurance cover for business use	3 May 18
7.	Apr 18	Throughout	Format / layout amended to bring in line with the Policy template. Additional sections for Training and Review included together with an updated EIA template.	3 May 18
8.	Feb 19	21	Amendments / clarification re overnight accommodation / expenses as included in the NHS Terms & Conditions Handbook, as discussed and agreed at Exec Team, 5 Feb 2019.	7 Feb 19
9	22 Jul 19	13	Amend to reflect that claims which are over 3 months old will need to be signed off by the Chief Finance Officer.	22 Jul 19

Review Log:

Include details of when the document was last reviewed:

Travel & Expenses Policy HR/028/V3.03
July 2019

Version 3.3

Version Number	Review Date	Reviewer	Ratification Process	Notes
2	July 2014	Associate Director of Communications & Organisational Development	Policy Sub Group, Corporate Governance Committee and CCG Board	Reviewed in line with national changes to the mileage rates, extending the time to claim expenses
2.4	April 2017	CSU HR Business Partner	May 2017 Policy Sub Group and Board	See amends 4, 5 & 6 above
3	April 2018	CSU HR Manager	May 2018 Policy Sub Group and Board	See amend 6 above
		CCG Governance Manager		
3.2	May 2019	Interim HR Advisor	May 2019 Policy Sub Group	Full review. Claim procedure for eye tests / glasses for VDU use clarified.

TRAVEL AND EXPENSES POLICY

SUMMARY OF KEY POINTS TO NOTE:

This policy and procedure outlines the rules set out by the CCG for the reimbursement of travel and expenses that are necessarily incurred by any individual engaged on business approved by the CCG. Specifically:

- The policy applies to all staff on Agenda for Change terms and conditions as well as Board lay members and interims.
- Staff will be reimbursed for miles travelled in the performance of their duties which are in excess of the home to agreed work base return journey (exception is lay members who can claim from home).
- Allowance rates for travel by car, motorcycle, pedal cycle and when carrying passengers and bulky equipment are included within the policy. Expenses for parking, travelling by public transport, subsistence and overnight accommodation (prior approval by line manager required) when on CCG business can also be claimed.
- The policy also covers claims for eye tests / glasses for Display Screen Equipment use and on call expenses.
- All claims should be submitted on line using the E-expenses system by the 3rd working day of each month, supported by scanned copies of original receipts. Employees will need to retain original receipts for six years for income tax purposes.

TRAVEL AND EXPENSES POLICY

Contents

1. Introduction & Purpose.....	9
2. Scope.....	9
3. Principles	9
4. Travel expenses.....	10
4.1 Eligible miles.....	10
4.2 Car allowance	10
4.3 Reserve rate	10
4.4 Lease cars	10
4.5 Motorcycle allowance.....	10
4.6 Pedal cycles.....	10
4.7 Passenger rate.....	10
4.8 Other allowances	11
4.9 Training courses / conferences / events.....	11
4.10 Excess mileage.....	11
4.11 Bulky equipment	11
4.12 Public transport.....	11
5. Subsistence	11
5.1 Overnight accommodation	12
6. Other expenses.....	12
6.1 Eye test and glasses.....	12
6.2 On call payments	12
6.3 Expenses of candidate for appointment	12
6.4 Relocation expenses.....	12
6.5 Reimbursement of sundry expenses.....	12
7. Procedure	13
7.1 Travel and expenses on-line claims	13
7.2 Methods of payment.....	13
7.3 Exemptions	14
8. Roles & Responsibilities.....	14
9. Training.....	14
10. Equality Analysis	14
11. Success Criteria / Monitoring the Effectiveness of Policy	14
12. Review	15
13. References & Links to Other Policies / Documentation	15
Appendix 1 Tax and National Insurance Liabilities – from 1 July 13.....	16
Appendix 2 Eligibility Mileage.....	18
Appendix 3 Mileage Rates	19
Appendix 4 Authorisation to claim excess mileage.....	20
Appendix 5 Subsistence rates.....	21
Appendix 6 Equality Analysis	22

TRAVEL AND EXPENSES POLICY

1. INTRODUCTION & PURPOSE

- 1.1 Travel is an integral part of the work of many of West Hampshire Clinical Commissioning Group (CCG) staff and it is right that expenses incurred in travelling should be reimbursed.
- 1.2 The CCG is geographically widespread and will strive to minimise mileage by using IT (such as telephone conferences), by car sharing where the same meetings are attended and by scheduling diaries to ensure that only necessary journeys are made.
- 1.3 Sections 17 & 18 of the Agenda for Change NHS Terms & Conditions of Service Handbook provides for the reimbursement of staff for mileage allowances and subsistence cost. To view the Agenda for Change NHS Terms & Conditions of Service Handbook go to the NHS Employers web site at www.nhsemployers.org and look for the terms of conditions handbook.
- 1.4 The purpose of this policy is to provide:
 - A structured framework to claiming travel expenses
 - Practical guidance to staff and managers on process and procedure
 - To ensure that travel expenses are claimed in a consistent, accurate and timely way.
 - Guidance on mileage allowance, plus local arrangements for electric cars

2. SCOPE

- 2.1 This policy and procedure is for employees on Agenda for Change terms and conditions which includes clinicians. It also applies for non-Agenda for Change Board lay members and CCG interims.

3. PRINCIPLES

- 3.1 The purpose of this policy and procedure is to outline the rules set out by the Clinical Commissioning Group for the reimbursement of travel and expenses that are necessarily incurred by any individual engaged on business approved by the CCG.
- 3.2 The primary purpose of travel and subsistence allowances is to reimburse the necessary costs of meals, accommodation and travel arising as a result of official duties away from home.
- 3.3 The rates and conditions are, where appropriate those set out in the relevant Terms and Conditions Handbooks, or otherwise agreed by the CCG.
- 3.4 This document is mandatory and applies to all staff on Agenda for Change Terms and Conditions, Lay Members, CCG interims and interview candidates.

- 3.5 Any abuse of this policy will be investigated and may result in criminal or disciplinary action being taken.
- 3.6 Travel and expenses claims are subject to Tax and National Insurance Liabilities as detailed in Appendix 1.

4. TRAVEL EXPENSES

4.1 Eligible miles

Staff will be reimbursed for miles travelled in the performance of their duties for the West Hampshire CCG which are in excess of the home to agreed work base return journey. Eligible miles are normally those travelled from the agreed work base and return. However when the journey starts at a location other than the agreed work base e.g. home, the eligible miles will be as set out in Appendix 2.

Lay members can claim for total mileage from home to base / base to home.

4.2 Car allowance

All car mileage will be reimbursed at one of two Standard Rates for car drivers registered with the CCG regardless of the vehicle size. An additional local arrangement has been included to take account of electric vehicles. The mileage rate is dependent on car usage (see Appendix 2).

4.3 Reserve rate

Any member of staff who does not register their vehicle with the CCG will be reimbursed at the Reserve Rate for any mileage claimed. The reserve rate is also implemented for specific reasons for travel such as – excess mileage due to NHS merger or CCG organisational change, temporary moves or secondment attending training courses.

4.4 Lease cars

Please refer to the West Hampshire CCG Lease Car Policy.

4.5 Motorcycle allowance

Members of staff using a motorcycle for official journeys will be reimbursed a mileage rate as set out in Appendix 3

4.6 Pedal cycles

Members of staff using a pedal cycle for official journeys will be reimbursed a mileage rate as set out in Appendix 3

4.7 Passenger rate

When members of staff travel together on CCG business and separate claims would otherwise be made, the driver may claim a passenger allowance as set out in Appendix 3. The name and designation of all passengers must be shown on the e-expenses claim. Passenger allowance is not payable to lease car drivers.

4.8 **Other allowances**

Staff will be reimbursed the reasonable parking, garage, train, bus, toll, airfare and ferry costs when on West Hampshire CCG Business on production of a valid receipt.

4.9 **Training courses / conferences / events**

All employees attending manager approved training courses, conferences or events are eligible to claim mileage over and above home to work mileage on the Standard Rate. Course trainers providing training at a base other than their normal work base will claim mileage over and above home to work mileage on the rate that they are registered to receive.

4.10 **Excess mileage**

Where there is a compulsory requirement for an employee to change their base of work on a temporary or permanent basis e.g. a merger of NHS employers, acceptance of another post as an alternative to redundancy, change of work base, the employee may be reimbursed their extra daily travelling expenses for a period of time from the date of transfer (refer to the Organisational Change Policy). Mileage will be reimbursed at the reserve rate or through the submission of receipts, the cost of public transport. Excess mileage authorisation form is set out in Appendix 4.

If a member of staff who is claiming excess travel subsequently moves home they must complete a new Excess Travel Authorisation Form in order that the new mileages may be calculated and adjusted accordingly.

4.11 **Bulky equipment**

Where, at the requirement of the employer, an employee carries heavy or bulky equipment in a private car, an allowance at the rate specified in Appendix 2 for journeys on which the equipment is carried. (The equipment must be either of a weight that is unreasonable to be carried or alter the seating capacity of the vehicle).

4.12 **Public transport**

If an employee uses public transport for business purposes the cost of bus fares and standard rail fares will be reimbursed.

5. **SUBSISTENCE**

Any member of staff who is required to be away from home for business purposes may claim for additional costs that are incurred, up to the limits set by the West Hampshire CCG. Refer to Appendix 5 for maximum reimbursement limits. Claims will only be authorised if they are submitted on line using the E-expenses system supported by scanned copies of original receipts but these payments will be subject to income tax deductions. The CCG will not pay for the cost of any alcoholic beverages.

5.1 **Overnight accommodation**

If a member of staff stays overnight in a hotel, or other similar accommodation, for business purposes that have been approved by their manager, the overnight costs for bed and breakfast will be reimbursed up to the limits set by the CCG. In exceptional circumstances where accommodation is not available within the agreed limit, the employee should seek the most competitive rates and ensure that these are approved by the line manager prior to the expenditure being incurred. Any claims that exceed the agreed limit must be clearly noted to show that prior approval for the expenditure has been given. The cost of up to two further day time meals may be reimbursed in any 24 hours, up to the maximum of the appropriate meals allowance as detailed in Appendix 5.

6. **OTHER EXPENSES**

6.1 **Eye test and glasses**

The CCG will meet the full cost of eye tests for Display Screen Equipment (DSE) users where prescribed exclusively for display screen work (VDU) where these are not free. The CCG will contribute up to £50 towards corrective lenses and frames. You must pay for the eye test and any corrective appliance. You will then need to claim via e-expenses and scanned evidence of the VDU prescription and receipts need to be provided as per section 6.2 of this policy.

The provision of 'normal' corrective lenses will be at the employee's own expense.

6.2 **On call payments**

For eligible staff the on call payments need to be claimed via e-expenses. Please refer to the Corporate Emergency Preparedness, Resilience and Response Policy: On Call Policy for details on eligibility and the payment amount.

6.3 **Expenses of candidate for appointment**

Agreement to pay candidates interview expenses must be approved with the appointing officer prior to interview. The appointing officer is responsible for informing candidates of the process and handling the associated internal administration. Candidates must complete an Interview Travel and Expenses Claim Form. Reimbursement of expenses shall not be made to employees who withdraw their application or refuse an offer of appointment.

6.4 **Relocation expenses**

Please refer to local West Hampshire CCG Relocation Guidance and Procedure.

6.5 **Reimbursement of sundry expenses**

In exceptional circumstances it may be necessary for a member of staff to purchase sundry items which may be required in order to carry out their duties. The budget manager must give prior approval for all such expenditure and original receipts must accompany the claim for reimbursement. The CCG would not expect sundry items to be purchased if they could be obtained through the normal purchasing procedure.

7. PROCEDURE

7.1 Travel and expenses on-line claims

The NHS has a duty of care obligation to all of its employees. To ensure compliance of this duty of care and to make sure this obligation is fulfilled, all employees who are required to use their own vehicle and/ or wish to claim for expenses for business purposes will have to submit the following documentation, details of which will be stored within the E-Expenses system

- Driving Licence (photo card)
- Car Insurance – must include insurance cover for business use
- Car Tax – online confirmation
- MOT/vehicle registration form – copy of online/electronic certificate

Once submitted the documents are to be kept up to date at all times by employees. The system will remind staff when documents are due to expire so the system can be updated.

Employees are expected to report any material changes e.g. endorsements on their licence, change of insurer as they occur.

Mileage claims will be rejected by the system if any or all of the documents are out of date.

Managers, in approving the payments, are confirming that they have had sight of the documents and that they are valid.

7.2 Methods of payment

Expenses payments will be made monthly with salary payments. All completed claim forms should be submitted on-line using the e-expenses system on the 3rd working day of month for payment in the next month's salary. Payment will be withheld or delayed if the necessary documentation is not completed and recorded on the system appropriate procedures followed.

It is the manager's/budget holder's responsibility to ensure that staff are made aware of the correct procedure to follow for the claiming of expenses.

All claims should be made within three months of the expense taking place. Claims which are over 3 months old will need to be reviewed and signed off by the Chief Finance Officer.

Expenses payments will only be authorised if they are submitted on-line using the E-expenses system supported by scanned copies of original receipts (except for mileage).

Employees will need to retain the original receipts for six years for income tax purposes.

Only claims signed off by an authorising manager via the on-line e-expenses system will be processed for payment.

7.3 Exemptions

There will be no reimbursement of

- Parking fines
- Speeding fines
- A contribution towards vehicle running costs or additional personal motoring costs, (the mileage allowance is set at a level to include this)

The organisation forbids the use of handheld mobile phones and asks employees to refrain from using even hands-free mobile phone sets whilst driving.

8. ROLES & RESPONSIBILITIES

- 8.1 All employees have a responsibility for ensuring that their travel and expense claims are accurate and comply with this policy. In signing a travel claim they are confirming that the information in it is correct. Falsely claiming travel and other expenses to which they are not entitled is fraudulent, and will result in criminal and/or disciplinary action being taken.

9. TRAINING

- 9.1 No specific training is required. Guidance on how to use e-expenses can be found on the [HR Portal](#).

10. EQUALITY ANALYSIS

- 10.1 In applying this policy, the CCG will have due regard for the need to eliminate unlawful discrimination, promote equality of opportunity, and provide for good relations between people of diverse groups, in particular on the grounds of the following characteristics protected by the Equality Act (2010); age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sexual orientation, in addition to offending background, trade union membership, or any other personal characteristic.
- 10.2 An equality analysis has been carried out on this policy – Appendix 9.
- 10.3 An employee with a disability that means a particular mode of transport or journey destination presents access issues, should discuss their individual needs with their line manager. The CCG will reimburse all reasonable and previously agreed travel expenses in such circumstances on an individual case by case basis.

11. SUCCESS CRITERIA / MONITORING THE EFFECTIVENESS OF POLICY

- 11.1 This Policy is subject to frequent review in line with Agenda for Change NHS Terms and Conditions of Service in line with the publication of the AA Guides indicating motoring costs. Amendments to mileage allowances will only take place if rates increase or decrease by 5%.

11.2 In addition the policy and procedure will be reviewed periodically by Human Resources in conjunction with operational managers and Trade Union representatives. Where review is necessary due to legislative change, this will happen immediately.

12. REVIEW

12.1 This document may be reviewed at any time at the request of either staff or management, or in response to new legislation or guidance, but will automatically be reviewed on an annual basis.

13. REFERENCES & LINKS TO OTHER POLICIES / DOCUMENTATION

- Lease Car Policy
- Local Anti-Fraud, Bribery & Corruption Policy
- Conduct, Performance, Grievance & Absence Management Policy: Disciplinary Procedure
- Organisational Change Policy
- Relocation Guidance and Procedure
- Health and Safety Policy
- Corporate Emergency Preparedness, Resilience and Response Policy: On Call Policy

Appendix 1 Tax and National Insurance Liabilities – from 1 July 13

For details of HM Revenue and Customs guide to personal Taxable Allowances and Rates www.hmrc.gov.uk

Mileage reimbursement is a 'payment' from your employer that can be subject to tax and national insurance deductions on the whole amount. However if the payment is clearly for costs incurred in the performance of an employee's duties then tax relief can be obtained.

If you are reimbursed for travel that is not considered to have been undertaken in the course of an employee's duties, then there will be no tax relief available and the full amount will be considered as income and subject to tax and national insurance accordingly.

HMRC operate an Approved Mileage Allowance Payment (AMAP) which enables tax free reimbursement. Table 1 below provides information for the tax year 2013/14 as an example for guidance only as these may be revised at any time dependent on government policy.

The total miles travelled, regardless of the rate at which they are reimbursed, will be reported to the Inland Revenue at the end of the financial year in order that taxable benefit can be calculated. The taxable benefit will feature on each employee's P11d if you are not covered under the taxed at source arrangement.

Table 1 – AMAP rates

Type of vehicle	Tax year
Cars up to 10,000 miles	45p per mile
Electric cars up to 10,000 miles	40p per mile
Cars over 10,000 miles	25p per mile
Electric cars over 10,000 miles	20p per mile
Motorcycle	24p per mile
Bicycle	20p per mile

Any queries relating to your tax position should be directed to your local tax office

Type of payment	Tax liability	National Insurance liability
Business Miles	The tax free allowance is deducted from the amount paid and tax is due on the balance, this is reported on the P11d or Taxed at Source (TAS) in-line with the individual arrangement for your West Hampshire CCG.	Deducted on profit element of mileage

Type of payment	Tax liability	National Insurance liability
Reserve Rate	The tax free allowance is deducted from the amount paid and tax is due on the balance, this is reported on the P11d or Taxed at Source (TAS) in-line with the individual arrangement for your West Hampshire CCG.	Deducted on profit element of mileage
Excess travel	If the change of base is permanent there is a liability for tax which will be deducted from pay. There is no liability if the change is temporary for less than 24 months.	As with tax
Passengers	The tax free allowance is deducted from the amount paid and tax is due on the balance, this is reported on the P11d or Taxed at Source (TAS) in-line with the individual arrangement for your West Hampshire CCG.	No liability
Pedal Cycles	The tax free allowance is deducted from the amount paid and tax is due on the balance, this is reported on the P11d or Taxed at Source (TAS) in-line with the individual arrangement for your West Hampshire CCG.	No liability
Course/Study Travel (now Reserve Rate)	The tax free allowance is deducted from the amount paid and tax is due on the balance, this is reported on the P11d or Taxed at Source (TAS) in-line with the individual arrangement for your West Hampshire CCG.	No liability
Home to base travel	There is a liability for tax which will be deducted from pay.	As with tax
Othertravelling expenses eg parking, toll charges	Provided that these are supported by receipts there is no tax liability	As with tax
Subsistence and other reimbursements	Provided that the expense is receipted and is a reimbursement of amounts actually paid, there is no tax liability	As with tax
Relocation Expenses	Tax free up to £8,000 provided that expenditure falls within the categories set out in the Inland Revenue Regulations.	As with tax

Appendix 2 Eligibility Mileage

Eligible mileage – illustrative example		
In this example the distance from the employee's home to the agreed base is 15 miles		
Journey (outward)	Distance	Eligible miles
Home to base	15 miles	None
Home to first call	Less than 15 miles	Eligible mileage starts after 15 miles have been travelled
Home to first call	More than 15 miles	Eligible mileage starts from home, less 15 miles
Journey (return)		
Last call to base		Eligible mileage ends at base
Last call to home	Less than 15 miles	Eligible mileage ends 15 miles from home
Last call to home	More than 15 miles	Eligible mileage ends 15 miles from home

Appendix 3 Mileage Rates

Rates will be reviewed twice a year April / May (to match release of AA Guides) and again in November. Should rate calculation amend mileage costs either up or down by 5% this will be amended to affect mileage claims from July onwards (after April/May) or January (following November).

Type	Standard Rate Up to 3500 miles	Standard rate Over 3500 miles	Reserve Rate All eligibility miles	All Eligibility miles
Car	56p	20p	28p	
Electric car	40p	21p	28p	
Motor Cycle				28p
Pedal				20p
Passenger				5p
Bulky				3p

Appendix 4 Authorisation to claim excess mileage

AUTHORISATION TO CLAIM EXCESS MILEAGE

“Where there is a compulsory requirement for an employee to change their base of work on a temporary or permanent basis e.g. a merger of NHS employers, acceptance of another post as an alternative to redundancy, change of work base, the employee may be reimbursed their extra daily travelling expenses for a period of four years from the date of transfer. Mileage will be reimbursed at the reserve rate or through the submission of receipts, the cost of public transport.”
 Travel & Expenses Policy Para 3.11

This form is to be completed by the claimant and authorised by their line manager.

Name	
Home Address	
Old Base	
New Base	
Date of Change	
Protection Period dates	

EXCESS MILEAGE CALCULATION

Daily return mileage from home to present base	
Daily return mileage from home to future base	
Excess miles (difference between present and future return mileage)	

I attend work at present on.....occasions each week and will be attending for work at my new base on.....occasions each week.

I certify that the above information is correct and accurate.

Claimants signature _____ Date _____

Authorising Manager signature _____ Date _____

Appendix 5 Subsistence rates

1. Night allowances: first 30 nights - Actual receipted cost of bed and breakfast up to a maximum of £55.

Where the maximum limit is exceeded for genuine business reasons (e.g. the choice of hotel was not within the employee's control or cheaper hotels were fully booked) additional assistance may be granted at the discretion of the line manager. Approval should be sought prior to the expenditure being incurred (refer to section 5.1).

2. Night allowances in non-commercial accommodation - Per 24 hour period: £25.00

3. Night allowances: after first 30 nights

Married employees and employees with responsibilities equivalent to those of married employees Maximum amount payable: £35.00 Employees without responsibilities equivalent to those of married employees and those staying in non-commercial accommodation Maximum amount payable: £25.00

4. Day meals subsistence allowances

Lunch allowance (more than five hours away from base, including the lunchtime period between 12:00 pm to 2:00 pm) £5.00 Evening meal allowance (more than ten hours away from base and return after 7:00 pm) £15.00

5. Incidental expenses allowance (this allowance is subject to a tax liability) – Per 24 hour period: £4.20

6. Late night duties allowance (this allowance is subject to a tax liability) – Per 24 hour period: £3.25

Equality impact assessment

Title of policy, project or proposal:
Travel & Expenses Policy

Name of lead manager: Heather Hauschild
Directorate: Corporate

What are the intended outcomes of this policy, project or proposal?
The purpose of this policy and procedure is to outline the rules set out by the Clinical Commissioning Group for the reimbursement of travel and expenses that are necessarily incurred by any individual engaged on business approved by the CCG.

Evidence
<p>Who will be affected by the policy, project or proposal? Identify whether patients, carers, communities, CCG employees, and/ or NHS staff are affected. CCG employees and candidates for appointment.</p>
<p>Age Consider and detail (including the source of any evidence) the impact on people across the age ranges. No impact</p>
<p>Disability Consider and detail (including the source of any evidence) the impact on people with different kinds of disability (this might include attitudinal, physical and social barriers). Certain medical conditions are automatically classed as being a disability – for example, cancer, HIV infection, multiple sclerosis. An employee with a disability may experience issues with regard to a particular mode of transport or journey destination. In these cases they should discuss their individual needs with their line manager. The CCG will reimburse all reasonable and previously agreed travel expenses in such circumstances on an individual case by case basis.</p>

Dementia

Given the CCGs commitment to commissioning 'Dementia Friendly' services, consider and detail any impact on people with dementia.

No impact.

Gender reassignment (including transgender)

Consider and detail (including the source of any evidence) the impact on transgender people. Issues to consider may include same sex/ mixed sex accommodation, ensuring privacy of personal information, attitude of staff and other patients.

No impact.

Marriage and civil partnership

Note: This protected characteristic is only relevant to the need to eliminate discrimination within employment. Where relevant, consider and detail (including the source of any evidence) the impact on people who are married or in a civil partnership (for example, working arrangements, part-time working, infant caring responsibilities).

No impact.

Pregnancy and maternity

Consider and detail (including the source of any evidence) the impact on women during pregnancy and for up to 26 weeks after giving birth, including as a result of breastfeeding.

No impact.

Race

Consider and detail (including the source of any evidence) the impact on groups of people defined by their colour, nationality (including citizenship), ethnic or national origins. Given the demography of west Hampshire this will include Roma gypsies, travellers, people from Eastern Europe, Nepalese and other South East Asian communities. Impact may relate to language barriers, different cultural practices and individual's experience of health systems in other countries.

No impact.

Religion or belief

Consider and detail (including the source of any evidence) the impact on people with different religions, beliefs or no belief. May be particularly relevant when service involves intimate physical examination, belief prohibited medical procedures, dietary requirements and fasting, and practices around birth and death.

No impact.

Sex (gender)

Consider and detail (including the source of any evidence) the impact on men and women (this may include different patterns of disease for each gender, different access rates).

No impact.

Sexual orientation

Consider and detail (including the source of any evidence) the impact on people who are attracted towards their own sex, the opposite sex or to both sexes (lesbian, gay, heterosexual and bisexual people).

No impact.

Carers

Consider and detail (including the source of any evidence) the impact on people with caring responsibilities. This must include people who care for disabled relatives or friends (as they are protected by discrimination by association law), but you should also consider parent/ guardian(s) of children under 18 years. Carers are more likely to have health problems related to stress and muscular-skeletal issues, they may have to work part-time or certain shift-patterns, or face barriers to accessing services.

No impact.

Serving Armed Forces personnel, their families and veterans

The needs of these groups should be considered specifically. The CCG has a responsibility to commission all secondary and community services required by Armed Forces' families where registered with NHS GP Practices, and services for veterans and reservists when not mobilised (this includes bespoke services for veterans, such as mental health services).

No impact.

Other identified groups

Consider and detail (including the source of any evidence) the impact on any other identified groups. Given the demography of west Hampshire this should include impact of:

- Poverty
- Living in rural areas
- Resident status (migrants and asylum seekers).

No impact.

Involvement and consultation

For each engagement activity, briefly outline who was involved, how and when they were engaged, and the key outputs

How have you involved stakeholders with an interest in protected characteristics in gathering evidence or testing the evidence available?

Not applicable.

How have you involved/ will you involve stakeholders in testing the policy, project or proposals?

The policy underwent a full consultation process which included the Chief Officer, Staff Side Representative, Policy Sub Group, Local Counter Fraud Specialist, Equality & Diversity Lead and the Corporate Governance Committee (now Finance & Performance Committee).

Equality statement

Considering the evidence and engagement activity you listed above, please summarise the findings of the impact of your policy, project or proposal. Consider whether the evidence shows potential for differential impact, if so state whether adverse or positive and for which groups.

Impact summary (statutory considerations)			
Age	Positive	Neutral	Negative
Disability	Positive	Neutral	Negative
Sexual orientation	Positive	Neutral	Negative
Race	Positive	Neutral	Negative
Religion or belief	Positive	Neutral	Negative
Gender reassignment	Positive	Neutral	Negative
Sex	Positive	Neutral	Negative
Marriage and civil partnership	Positive	Neutral	Negative
Pregnancy and maternity	Positive	Neutral	Negative

Other policy considerations			
Poverty	Positive	Neutral	Negative
Place (Rural versus urban living)	Positive	Neutral	Negative
Serving Armed Forces/ veterans	Positive	Neutral	Negative
Other factors	Positive	Neutral	Negative
Have you identified any positive or negative impacts?	No		
	If 'Yes' please provide details below		

Positive impacts

Where there is evidence, provide a summary of the positive impact the policy, project or proposal will have for each protected characteristic, and any other relevant group or policy consideration. This should include outlining how equal opportunities will be advanced and good relations fostered between different groups.

Not applicable.

Negative impacts

Where there is evidence, provide a summary for each protected characteristic and any other relevant group or policy consideration. If the evidence shows that the policy, project or proposal will or may result in discrimination, harassment or victimisation this **must be** outlined.

Not applicable.

Health inequalities

Please outline any health inequalities highlighted by the evidence (for example, differential access to services or worse health outcomes for particular groups or localities).

Not applicable.

Action planning for improvement, and to address health inequalities and discrimination

Please give an outline of the key actions based on any gaps, challenges and opportunities you have identified. Include here any general action to address specific equality issues and data gaps that need to be addressed through consultation or further research.

Action	Person responsible	By date
No action required.		

For your records

Person who carried out this assessment: Governance Manager

Date assessment completed: 3 May 2018

Date to review actions:

Responsible Director: Director of Performance & Delivery

Date assessment was approved: