



AEP & Non-Employee Guidelines for Claiming Travel and Subsistence Expenses

This document provides guidance to AEP staff ONLY, to ensure the process of claiming expenses is as quick and easy to understand as possible. It tells you exactly what you are entitled to claim and how to complete the Shared Business Services (SBS) Expenses Claim Form. If you have any questions relating to claims for training courses, please speak to a member of the Human Resources (HR) team. For any questions relating to Antarctic travel T&S please direct them to the Operations & Logistics (OPAL) Support Team.

The cost of your training courses will be met in advance by BAS and, in nearly all instances, any overnight accommodation that is required in relation to the attendance of the course.

However, for most travel and meals you will need to pay at the time and claim your expenses back.

For most AEP staff going to Antarctica flights from UK to the Gateway (departure point to Antarctica) will be arranged by the OPAL Support Team. Bed & Breakfast and transfers en route will also be arranged. You will however need to claim for lunch and dinner whilst in transit through Punta Arenas (PA) and Cape Town (CPT). The only Gateway to provide all meals is the Falkland Islands. **You cannot claim for any meals in transit through the Falkland Islands.**

Section A: How to Complete the SBS Expenses Claim Form

1. a. Please list 'NERC' in 'Council' box.
2. Complete your personal details (full name and address please to avoid errors due to staff with similar names).

f. Leave the 'Supplier Number' box empty.

'Reason for Claim' please enter a description of your claim, eg attending advanced first aid course.
3. Complete all of this section. **FAILURE TO DO THIS WILL RESULT IN THE CLAIM FORM BEING RETURNED TO YOU UNPAID.**
4. Leave this section blank as this is for HR/OPAL Support Team as the budget holders to complete.
5. Complete your full bank details. **You will need to do this in full on every claim form**, as travel and subsistence claims are **NOT** linked to the payroll system.
6. Complete these sections with as much detail as possible e.g. Lunch at 'restaurant name' and the title of the course attended.
7. If listing a 'to' and 'from' journey you must include addresses and/or postcodes as these will be checked. Please list each journey on a separate line and provide the date of each journey, the reason for the journey or title of the course attended.
- Leave the project coding sections blank as this is for HR/OPAL Support Team as the budget holders to complete.

- Ensure you have receipts for all travel and expenses and staple these securely to the claim form. **THE SBS WILL NOT PAY CLAIMS WITHOUT A RECEIPT OR OTHER PROOF OF PURCHASE.**

Hand or post claim form to a member of the HR team (training) or OPAL Support Team (Antarctic travel). If you are posting, please address it to Charlotte Peck/Sally Henry, Human Resources for training or Julia Fear/Megan Wall, OPAL Support Team for Antarctic travel, British Antarctic Survey, High Cross, Madingley Road, Cambridge, CB3 0ET, United Kingdom.

The claim form is also available electronically with calculation formulas but please note that if using it in this format it still has to be submitted with an **actual** signature and not just a typed name, so will still need to be printed, signed, scanned and e-mailed back.

Section B: Ensuring Prompt Payment

We will do everything we can to ensure you are reimbursed for any expenses as soon as possible. To help speed up the process we recommend the following:

- **Retain all receipts and tickets to back up your claim.** The SBS will **NOT** pay claims submitted without receipts or other proof of purchase, except subsistence daily rates incurred whilst in transit to Antarctica (see below for rates). If you are sending a lot of receipts with one claim please number each receipt to correspond with the entry on the claim form.
- You may also want to photocopy any receipts relating to high expenditure in case the claim is lost in the post before it reaches BAS.
- **Submit your claim as soon after each course/journey as possible.** If you are attending a number of courses, send in a separate form for each, rather than waiting until after the last course. (Please note that SSC may refuse to pay claims that are submitted more than six months after the event/journey.)
- **Include the title of the training course/details of trip and dates on the form.**

HR/OPAL Support Team will check and authorise your claim before sending it to the SBS who will arrange payment. Hopefully we can pre-empt any questions they might have (and can give you a call if we need any clarification), but the general rule of thumb is the more information you can provide on the claim, the better. Please be aware that knowingly making a false statement in support of a claim for expenses will lead to disciplinary action.

Section C: What are you Entitled to Claim?

1. Accommodation – Training Courses

- a. **Hotel/Bed and Breakfast/Guesthouse** – This will normally have been arranged for you and paid for by BAS up front. The joining instructions for the course will indicate whether breakfast is included.

If you are in a position where you need to book bed and breakfast then you can claim for actual expenditure up to a limit of £120 per night (£170 per night for London and Edinburgh). If it is impossible to find anything at this price then please contact us beforehand, and keep all receipts as proof of your costs. You may also be required to demonstrate that it was not possible to obtain accommodation within the stated price level.

- b. **Friends and Family** – A £25 per night allowance can be claimed for staying overnight with friends or family instead of in a hotel or bed and breakfast. No receipts need be submitted. You cannot claim for either the cost of dinner or the £5 Personal Incidental Expenses (see point 3. overleaf) when claiming this, however receipted breakfast/lunch costs may be claimed. To claim please contact HR for a different form.

2. **Accommodation – Whilst in Transit to Antarctica**

- a. **Hotel/Bed and Breakfast/Guesthouse** – this will always be arranged for you and paid for by BAS in advance. You will be met at the airport and taken to your accommodation by our local agents, breakfast is always provided.

3. **Meals - UK**

If meals are not arranged and paid for in advance, you can claim actual costs (supported by receipts) up to the following limits (claims may be cut back to these maximums if exceeded):

- Breakfast (if not included in hotel rate) £7.50 inc VAT
- Lunch £15.00 inc VAT
- Dinner £25.00 inc VAT

Please note gratuities remain at your own discretion and will not be reimbursed. The only exception to this is a service charge that is automatically added to the bill by the restaurant.

Alcohol – a restaurant dinner bill may include a reasonable amount of alcohol e.g. a glass of wine or a pint of beer, however NERC will not meet a claim where alcohol forms a substantive part of the bill. Claims for alcohol consumed as part of lunch will **NOT** be met.

Group Payment – one person from a group (all have to be BAS/NERC staff) can pay for a whole meal and claim it back. The reasons should be highlighted on the claim form along with the names of those present.

4. **Meals – Whilst in Transit to Antarctica**

Breakfast will always be provided whilst in transit to Antarctica. You can claim for receipted items for lunch and dinner or claim the subsistence rates listed below. The exception to this is the Falkland Islands where all meals are provided by BAS and paid for in advance. **If you choose to eat elsewhere you cannot claim for the meals retrospectively.**

Daily subsistence rates apply as follows:

- Punta Arenas – 16,626.0 Chilean Pesos – if claiming for over 5 hours
- Punta Arenas – 41,395.50 Chilean Pesos – if claiming for over 10 hours

- Cape Town – 147.0 South African Rand – if claiming for over 5 hours
- Cape Town – 388.50 South African Rand – if claiming for over 10 hours

When completing your T&S claim form please leave subsistence rates in local currency, these will be converted by the SBS when the claim is processed.

If you are transiting through another Gateway, please contact OPAL Support Team for the daily rate.

f. Personal Incidental Expenses

You can also claim £5 Personal Incidental Expenses for each **full 24-hour** period that you are away whilst **on a training course in the UK**. This does not apply whilst in Antarctica.

g. Travel

- a. **Private car** – If you are travelling by car the mileage allowance is 45p per mile. Please keep a careful check on your work mileage. If you take a detour please give your reason and which route you took, otherwise claims may be reduced to the direct mileage. You must ensure that you have suitable insurance cover in place at the time of the journey.
- b. **Hire car** – You will be entitled to claim back the cost of any fuel that you put into the car. Please note that you must retain receipts in order to claim back fuel costs.
- c. **Motorcycle** – For travel by motorcycle the mileage allowance is 24p per mile. If you take a detour please give your reason and which route you took, otherwise claims may be reduced to the direct mileage.
- d. **Train** – We can provide rail vouchers if we are notified in advance of your travel plans (these vouchers can be exchanged at the station for a ticket). If you need to purchase a train ticket, please retain the receipt in order to claim back the cost. Ensure the cheapest ticket is purchased for your journey – return tickets are often cheaper than two single journeys.
- e. **Plane** – Many internal flights are now more competitively priced than train journeys. We are happy to sanction flights, but please check with us before booking. Receipts or print-offs of online bookings should be kept in order to claim back the ticket cost.
- f. **Taxi** – Only use a taxi when there is no suitable public transport, if it's the most effective way to arrive on time, for safety (i.e. late at night) or you are transporting heavy luggage. You must have a receipt and explain why a taxi was needed on the claim form. If you tip up to 10% of the fare and this is included on the receipt then it will be reimbursed.
- g. **Pedal Cycle** – For travel by pedal cycle the mileage allowance is 20 pence per mile. If you take a detour please give your reason and which route you took, otherwise claims may be reduced to the direct mileage.

h. Training in Cambridge

When you are on contract with BAS you cannot claim for either travel to Cambridge or accommodation during your stay. This is because home to work travel is deemed as taxable by HM Revenue and Customs and therefore not allowable as an expense.

If you are attending a course in Cambridge before the commencement of your contract you are entitled to claim according to the guidelines above.