

Guidance notes on completing 0029A & B: Travel Claim Forms

All ArtForms staff (teachers, office staff, pianists and TAs) may claim car mileage, public transport and bike mileage for work-related travel.

If you travel by **car**, claim the miles you travel on the 0029 A & B claim forms, taking off home-to-work miles, which are explained below. You must also attach **original VAT fuel receipts** dated before or during the travel period. If you don't have receipts, sign and fill in the box on 0029B giving an explanation i.e. lost, used for another purpose, retained for self-employment tax records.

If you travel by **Public Transport** or **Taxi**, keep your receipts and submit those along with your claim form.

If you have to pay **Parking** at your destination, keep the receipt and submit along with your claim form.

'Place of Work' and 'Home to Work Miles' (Only for car journeys)

All staff who do not have one fixed place of work will be assigned a 'place of work' to use for their mileage calculations. To do this, we identify the claimant's nearest Music Centre/ArtForms base (i.e. nominal 'normal place of work') via the shortest route from their home postcode. This distance between your nearest Music Centre/ArtForms base and your home are your 'home to work miles' rounded to the nearest mile. We will let you know your 'home to work miles' and you will need to deduct these from your first and last journey of each day when submitting your travel claim.

Please note that if you live outside Leeds you are not entitled to claim for any mileage undertaken before you cross the Leeds boundary. Your 'home to work' miles are therefore based on the distance between the point at which you would (notionally) cross the boundary into Leeds to get to your nearest Music Centre/ArtForms base from home via the shortest route (even if that journey is not part of your timetabled commitments in Leeds).

Recording mileage

For every day that you work for ArtForms, you need to record your mileage from home, between schools and returning home. You can either take milometer readings from your car or use a web based app like Google Maps to do the calculation for you. You must record the post codes of your destinations and also the purpose of the journey. Please round journeys up and down to the nearest mile.

| Date | Post Code from | Post Code to | Purpose of journey |
|--------|----------------|--------------|--------------------------------|
| | | | |
| 8/6/15 | LS12 3BQ | LS17 5JB | TEACH AT (NAME OF 1ST SCHOOL) |
| | LS17 5JB | LS11 1GW | TEACH AT (NAME OF 2ND SCHOOL) |
| | LS11 1GW | LS12 3BQ | RETURN HOME |
| 9/6/15 | LS12 3BQ | LS7 2GB | TEACH AT (NAME OF 1ST SCHOOL) |
| | LS7 2GB | LS16 3JY | TEACH AT (NAME OF 2ND SCHOOL) |
| | LS16 3JY | LS14 5JT | TEACH AT (NAME OF 3RD SCHOOL) |
| | LS14 5JT | LS12 3BQ | RETURN HOME |

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How to complete the travel claim form

Start by filling in your name, personnel number, monthly pay date. Your Directorate/School is ArtForms, Children's Services.

Then you need to tell us the claim period, this differs dependent on when you are paid:

If you are paid on the 16th: your claim period runs from the 16th of one month to the 15th of the following month.

If you are paid on the 26th: your claim period runs calendar monthly.

NB: Check the claims period / deadline document relevant to your pay date to see when you have to submit your claim form to the ArtForms office.

Please submit your claim **every month** (and not 'in bulk') and in time for the claim deadlines to ensure you are reimbursed promptly.

Fill in your Vehicle Registration, engine size and fuel type.

The business miles, personal miles, total miles and miles not reimbursed columns are calculated on page two of the form as follows:

Calculating mileage

The claim form is set up with formulas which should auto-calculate your mileage as you go along.

- Start by completing the date, Post Code From, Post Code to, and purpose of the journey
- Fill in the 'Total Miles' column (B) with the number of miles for that journey.
- Fill in the 'Business Miles (C) with the number of miles you can claim for that journey. If it is the first/last journey of the day remember to DEDUCT your 'home to work' mileage from this figure.
- Total Miles to be reimbursed (E) will populate automatically with the amount entered at (C).
- Miles not reimbursed (F) will also populate automatically with the difference between (B) and (C). Check that this figure matches your 'Home to work' mileage for your first and last journey of the day.

Example below:

| | Total miles | Business miles reimb'd, not-tax at payment | Personal miles reimb'd, taxable at paym'nt | Total miles to be reimb'd | Miles not reimb'd |
|-----------------|--------------------|---|---|----------------------------------|--------------------------|
| | B | C | D | E | F |
| First journey | 4 | 1 | | 1 | 3 |
| Between schools | 1 | 1 | | 1 | |
| Journey home | 6 | 3 | | 3 | 3 |
| | 11 | 5 | | 5 | 6 |

Annotations: 'Home to work mileage' points to the '3' in column F of the 'Journey home' row. 'Totals' points to the '6' in column F of the 'Totals' row.

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On the first line, the first journey of the day is from home (or the point at which the claimant crosses the Leeds boundary) to their school and is 4 miles (input in column B). The claimant's home to work mileage is 3 miles. So the mileage to claim for this journey is $4 - 3 = 1$ (input in column C). An identical figure then automatically appears in column E and the number of home to work miles deducted automatically appears in column F.

The second line shows that they then travel 1 mile to their next school, so the figure input in 'B' is identical to that input in 'C' and automatically appears in 'E' – without any deduction.

On the third line, their final journey home is from their second school which is six miles away. So the mileage to claim for this journey is $6 - 3$, inputting is as per the first journey.

The total boxes at the foot of each column will auto-fill as you go along, carry forward to any continuation sheets and will also transfer the figures to the front of the form.

Other travel related expenses

If you have to pay for parking at any of your destinations, complete column G with the Type of expense (refer to the key information at the bottom of the form to find the correct code). This total will also transfer the amount to the front of the form.

For journeys home in the day

When a break is during a school day, a teacher or pianist is welcome to go home (e.g. for lunch), but **can't claim travel for it**. When there is a separate after-school session (usually for a CLYM group rehearsal or school concert) and it is reasonable to go home in between, then claim mileage for all the journeys. Home to work mileage need be deducted only from the first and last journeys in the day.

Bikes

The total figure for any bicycle mileage should be recorded in the appropriate box on the front of the form **as well as** recording journey details on 0029(b). Bicycle miles are reimbursed at 20p per mile. Motorbike miles are 17p per mile.

Public Transport Fares

If you travel by public transport, you'll claim the fares for bus, train or taxi* attaching receipts where possible. These must be the most reasonable fares; therefore if you know you will be travelling 2 or 3 journeys, you can claim up to the amount of a day rider, not the price for separate journeys. This principle applies to weekly and monthly tickets. Therefore: if you are on a heavy timetable and your bus journeys will come to more than the price of a weekly or monthly ticket, we encourage you to buy the cheapest ticket. You will only be allowed to claim over the amount of a monthly ticket in exceptional circumstances (i.e. a sudden increase in hours; emergency cover; inability to get between schools quickly enough on the bus, therefore taxi fares claimed by prior agreement with Head of Department*; bus broken down). Rail journeys must be second class and the cheapest available.

Use Column G on the second page of the form to record the type of expense and cost. This will autocomplete on the front of the form.

Taxis*

Taxis **cannot** be claimed for except in the following circumstances: in an emergency e.g. when the journey cannot be made by public transport (or bulky equipment needs to be transported) and it is agreed in advance by your line-manager / Head of Department. In this case, the guidance is that these journeys must be booked in advance through the ArtForms office, using approved suppliers.

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Submitting the claim form

Whilst it is possible to complete the spreadsheet electronically, you must send us a signed, hard copy of your completed form. We have recently been informed by the Business Support Centre that they “must receive a signed travel form with original receipts attached for audit purposes”. In light of this, we can only accept hard copies of travel claims (with receipts attached where possible, and a reason stated if not) and not via email. These hard copies **must** be signed and dated.

Before posting the form, double check:

You have signed and dated the form

You have told us your vehicle’s engine size

You have included petrol receipts or signed the box on page 2 explaining why they have not been attached

You have only submitted mileage rounded to nearest mile

Your copying and pasting is accurate and you haven’t inadvertently left on claim or journey details from a previous month

Then post the form to:

Travel Claims
ArtForms Office
Pudsey Civic Hall
Dawson’s Corner
Leeds
LS28 5TA