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Bord Oideachais agus Oiliúna
Mhaigh Eo, Shligigh agus Liatroma
Mayo, Sligo and Leitrim
Education and Training Board

Mayo, Sligo and Leitrim Education and Training Board

Travel and Subsistence Policy

MSLETB,
Finance Department,
Newtown,
Castlebar,
Co. Mayo
F23 DV78

V1 23/6/2020

DOCUMENT CONTROL SHEET

Business Unit	Finance Department, MSLETB
Work Category	
Document Title	Travel and Subsistence Policy
Document No.	V1

Rev (per footer)	Status	Author(s)	Reviewed By	Approved By	Office of Origin	Issue Date
Version 1	D01	JMcG	PW / NC	CE, Directors and MSLETB Board	HQ, Castlebar	2020-06-23

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This document serves as a Guide/Policy/ Procedure for Staff and Committee Members of Mayo, Sligo and Leitrim Education and Training Board (MSLETB).

Any queries or questions arising from this document should be addressed to the Finance Department MSLETB Admin Office, Quay Street, Sligo.

As with all communications within MSLETB, staff are reminded to treat all information in respect of requesters in the strictest of confidence.

1 PURPOSE

This policy sets out the protocols and procedures to be followed by staff when travelling on Mayo, Sligo and Leitrim Education and Training Board (MSLETB) business.

The travel and subsistence policy has been framed having regard to the following:

- a) Department of Education & Skills (DES) Circular Letters 0036/2017, 0037/2017, 0039/2017, 0038/2019 & 0039/2019
- b) Circulars issued by the Department of Finance and/or Department of Public Expenditure
- c) The efficient conduct of MSLETB business and
- d) Revenue requirements in relation to expenses paid to employees. Only expenses which are 'wholly, exclusively and necessarily' incurred in the performance of a staff member's duties may be re-imbursed on a tax-free basis.

2 SCOPE

The policy applies to all travel undertaken on ETB business regardless of the budget from which travel is funded (school/centre non-pay, other funds, self-financing budget).

3 GENERAL PRINCIPLES IN RELATION TO STAFF TRAVELLING ON ETB BUSINESS

- a) An allowance shall be paid only in respect of travel and subsistence expenses actually and necessarily incurred in the performance of an employee's official duty. All official travel should be by the shortest practicable route (*as per AA route planner*) and by the cheapest practicable mode of conveyance.
- b) An officer/employee will be authorised to use private transport for reasons connected with the ETB business only in the following circumstances:
 - No suitable public transport (i.e. train or bus) is available
 - Public transport is suitable only at equal or greater expense
 - The use of public transport would result in the loss of official time.
- c) Where a staff member travels to a location from home or returns home direct, the mileage payable will be calculated by reference to the distance from home or normal place of work, whichever is the lesser.
- d) Travel is not payable in respect of any portion of a journey which covers all or part of a staff member's usual route between home and headquarters.
- e) Where more than one person is travelling to the same meeting, arrangements should be made to avoid unnecessary duplication of the use of more than one car.
- f) Deductions to be made from the subsistence rate to take account of meals provided to an officer at no cost to him/herself, are as follows:
 - Where lunch or dinner is provided, a 5-hour rate should be deducted
 - Where both lunch and dinner are provided, a 10-hour rate should be deducted.
- g) Incurred costs e.g. Parking, Tolls, Taxi's will only be re-imbursed when receipts are provided.
- h) T&S claims for training for both staff and members will be payable at the reduced rates contained in Appendices 1 & 2 on Circular Letters 36/2017 & 39/2017 respectively.

- i) Payment of rates authorised are subject to (Circular Letter 11/1982) and any other instruction in force from time to time, including the distance requirements outlined in DPER (Circular Letter 05/2015).
 - Subsistence allowance is not payable for any absence at any place within 8km of the place of work or a person's normal place of residence.
 - An overnight allowance will normally only be claimed when you are 100km or more away from your home or place of work.

4 PAYMENT OF CLAIMS

- a) Claims must be submitted in a timely manner and in all cases no later than 3 months after the journey being undertaken. Claims in excess of 3 months from date of travel, will require approval of the Director of OSD/ CE.
- b) All claims for re-imburement of travel and subsistence must be authorised by the appropriate line manager/budget holder.
- c) All claims must include
 - Purpose of the journey
 - Mode of transport used
 - Cubic capacity of the engine if private transport is used
 - Date(s) and times of departure from and return to place of work/claimant's residence
 - Number of kilometres travelled.
 - Screenshot of AA Route planner for each journey.
- d) Incomplete/incorrect claims will be returned to the authoriser/claimant for amendment and re-submission and will result in late payments.

5 BOARDS OF MANAGEMENT, FINANCE AND AUDIT COMMITTEES

- a) Travel allowances for members of boards of management are to be capped at 20km per single journey by private car. (Circular Letter 64/2018). Where travel is undertaken by bus or train, only vouched expenses will be payable.
- b) Subsistence allowances will not be payable to members of boards of management for attendance at board meetings.
- c) External members of Audit or Finance Committees who are in receipt of a fee for attendance at the Audit or Finance Committee are not entitled to claim travel and subsistence expenses.

6 STAFF SHARING BETWEEN CENTRES/SCHOOLS

Travel and Subsistence allowances are not paid to staff working in more than one school/centre. However, in a case where a staff member is obliged by the ETB to work between more than one centre/school, specific approval of eligibility to claim travel and subsistence must be issued from Director/CE in advance. (Circular Letter 15/2019).

7 FOREIGN TRAVEL

Only essential travel is to be undertaken and the number of officers on any journey must be kept to an absolute minimum. Prior sanction by the Chief Executive is required for any expenditure incurred out of public funds on visits abroad.

8 IN-SERVICE EXPENSE CLAIMS

In-service claims must be submitted on the appropriate in-service form. A certificate of attendance, signed on the day by the course organiser must accompany the authorised allowance claim.

9 VEHICLE DETAILS

Claimants should ensure that they read and understand the terms and conditions as set out on the Indemnity Declaration form (Circular Letter 37/2017) prior to submitting claims. This form will require completion on an annual basis. Claimants are required to submit their Registration and Licensing Certificate (Log Book) with their first travel claim and subsequently where there is a change of vehicle.

10 REVIEW

This policy will be subject to review in accordance with organisational needs and/or where it is necessary to do so due to changes in DES/DPER Circular Letters, legislation or other such situations.

Appendix A

- (1) Travel & Subsistence Claim Form for MSLETB Staff
- (2) Travel & Subsistence Claim Form for MSLETB Board and Committee Members

**MAYO, SLIGO & LEITRIM EDUCATION AND TRAINING BOARD
CLAIM FOR PAYMENT OF TRAVELLING EXPENSES**



NAME: _____
ADDRESS: _____

CAR REG NO:	_____	INSURANCE COMPANY	_____
MAKE/MODEL:	_____	POLICY NO	_____
ENGINE CAPACITY:	_____	DATE OF EXPIRY	_____
HEADQUARTERS:	_____	CENTRE / SCHOOL	_____

DATE	TIME ABSENT			JOURNEYS		DETAILS OF MEETING/CONFERENCE ATTENDED/REASON FOR JOURNEY	KMS	SUBSIST	WERE MEALS PROV. Y/N	ACOMM. PROV. Y/N	OFFICE USE
	DEPART	RETURN	HOURS	FROM	TO						
TOTAL KM:							0		TOTAL SUB AMOUNT		
RATE PER KM:											
TOTAL TRAVEL AMT:											

Note: Public transport services (train, bus, etc.) should be used where available. Expenses of an unusual character should be supported by an explanation

- I hereby certify that:*
- (a) The travel/other expenses claimed were actually and necessarily incurred by me in the performance of my official duties.
 - (b) Expenses represent the lesser of: the distance between **home** and the **temporary place of work**; : the distance between the normal place of work and the temporary place of work.
 - (c) My motor insurance policy covers full third party insurance on official business in respect of the car detailed above.
 - (d) Mayo Sligo and Leitrim ETB have been indemnified on my insurance policy.
 - (e) I have a current driving licence and Vehicle Registration tax on the car.
 - (f) All details furnished by me herein are correct and no part of my allowance or expenses as claimed has been or will otherwise be recovered by me.
 - (g) CE Approval for Travel outside ETB area attached
 - (h) Travel & Subsistence will be paid in accordance with relevant Circulars

OTHER EXPENSES	AMOUNT
RAIL	
BUS	
TAXI FARE	
TOLLS	
TOTAL	€0.00

Please attach receipts in respect of the above

Signed: _____ (Print name clearly under Signature)
 Certified Correct: _____
 Principal/Centre Head
 Payment Approved: _____

TOTAL PAYMENT: € _____

<i>Office Use Only</i>	

Code _____

MAYO SLIGO & LEITRIM EDUCATION & TRAINING BOARD
MEMBERS CLAIM FOR PAYMENT OF TRAVELLING EXPENSES AND SUBSISTENCE ALLOWANCE
IN RESPECT OF ATTENDANCE AT MEETINGS OF BOARDS AND AUTHORISED
SUB-BOARDS THEREOF:

(1) Member's Name _____

(2) Ordinary place of residence _____

(3) Meeting Place of Committee _____

(4) (i) Date of Meeting attended _____

(ii) Appointed hour of meeting _____

(iii) Type of meeting _____
(i.e. Board Meeting, Board of Management, J.C.B., etc.)

(5) Particulars of claim for defrayal of expenses:

(i) Allowances in respect of attendance: SUBSISTENCE

Duration of Attendance	Precise time of leaving residence to attend meeting	Precise time of arriving back after attending meeting
From _____ To _____		

(ii) Travelling expenses: (claimable only when place of meeting is not less than eight km distant from residence).

Make of Car	Engine Capacity c.c.	Registration Number	Distance of residence from meeting place
			km

NOTE: Public transport services (train, bus, etc.) should be used where available. Expenses of an unusual character should be supported by an explanation.

CLAIM

I hereby claim payment of travel and/or subsistence expenses necessarily incurred by me in attending the meeting. I declare that no part of the expenses as claimed has otherwise been, or will be recovered by me.

SIGNATURE: _____

DATE: _____

Certified Correct: _____

Date: _____

FOR OFFICE USE ONLY

Total Absence From Residence: _____ Allowance Payable: € _____

Travelling Expenses _____ KM @ _____ cent per KM: € _____

Pay Order Number: _____ Total Payable: € _____