

Travelling Expenses for Interview Policy

Human Resources Policy No. W16.5

Additionally refer to:

- Recruitment and Selection Policy
- Reimbursement of Travel, Accommodation and Subsistence Expenses Policy

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Version Control Sheet

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V2		August 2020	Head of Workforce Resourcing	Draft	Consultation started on review of policy
V2.1		Feb 2022	Recruitment Manager	Draft	Review of policy, incorporating previous suggestions made during August 2020 and September 2021
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Contents

1	Policy on a Page.....	4
2	Introduction.....	4
3	Scope.....	4
4	Definitions.....	4
5	Responsibilities.....	4
6	Expenses to be paid.....	5
7	Claims Procedure.....	5
8	Training Needs.....	6
9	Review Process.....	6
10	Equality Impact Assessment (EQIA).....	6
	Appendix A Travelling Expenses Claim Form.....	7
	Appendix B Manual Payment Request Form.....	9

1. Policy on a Page

This policy sets out the Trust's approach to the payment of travelling expenses for individuals attending interview.

The overall objective of this policy is to ensure that both candidates attending for interview and appointing managers can agree a reimbursement of reasonable expenses incurred.

The level of reimbursement is to be agreed prior to the interview taking place.

This policy applies to external candidates and those employees currently employed by the Trust.

2. Introduction

- 2.1 The Trust recognises that it is good practice to provide reimbursement of reasonable expenses incurred by all candidates attending for interview and, where agreed with the appointing manager beforehand in writing/email, also for one visit to the Trust prior to interview. This policy sets out the standards and process to be adopted for the payment of such expenses.

3. Scope

- 3.1 The policy applies to candidates who are external to the Trust but also to candidates who are currently employed by the Trust who for the purpose of the interview are required to travel to the venue / hospital site that is not their normal base.

4. Definitions

- 4.1 **Public Transport rates** - Rates as defined by the Trust's Reimbursement of Travel, Accommodation and Subsistence Expenses policy.
- 4.2 **Mileage reimbursement rates** - Rates are set out in the Agenda for Change Terms and Conditions – Section 17 – reimbursement of travel costs: applies to all non-medical NHS staff. For medical staff – Pay and Conditions Circular (M&D 3/2021), Section 9.

5. Responsibilities

5.1 Appointing Managers

- 5.1.1 All Appointing managers are responsible for the equitable implementation of this policy. Support and guidance may be sought from the Medical People Services, Recruitment, Accounts Payable or Human Resources Team as appropriate.
- 5.1.2 Appointing managers will be required to review/authorise any claims for travelling for interviews within 10 working days of receipt of claim being received.

5.2. External candidates and employees

- 5.2.1 External candidates and employees will be required to observe the principles of the policy and where appropriate follow the procedure for submitting any claims for travelling expenses for interviews.

6. Expenses to be paid

6.1. External candidates

- 6.1.1 This policy applies to all interviewees. The Trust will reimburse travelling expenses from within the UK mainland or from the port of entry if an overseas applicant travelling from outside the UK and return journey.
- 6.1.2 Dependent on the mode of travel used, if travelling by train, the rate paid will be second class rail travel for return journey. Travel by taxi from the nearest railway station will be reimbursed on production of receipts. If any other form of transport is used e.g. by car - the amount reimbursed will be based on the actual miles travelled at NHS public transport rate (M&D), or Reserve rate for Agenda for Change bandings, or the actual expenses incurred if less. The mileage will be calculated from the candidate's home address to the Trust site address where the interview is held, using the information provided on Internet travel sites.
- 6.1.3 Reimbursement of overnight accommodation will only be considered if an overnight stay is required due to the timing of the interview or where candidates are travelling in excess of 100 miles (single journey). Where agreed, this will normally be at the current rate for 1 night's accommodation quoted by national budget hotel chains (e.g. Travelodge, Travel Inn) and will include, where appropriate, the cost of evening meal and breakfast at the rates set out in the the Trust's Reimbursement of Travel, Accommodation and Subsistence policy. The accommodation should be arranged directly by the Trust if required. Where the interview process will last over more than one day and will involve an overnight stay, the appointing manager has discretion on the payment of appropriate hotel accommodation expenses. Further expenses will be authorised by the appointing manager.
- 6.1.4 The Trust will not pay the cost of meals taken en-route to and from interviews. Where candidates are to be on site for a significant period of the day during the selection process, managers should consider providing or reimbursing the cost of appropriate refreshments.

6.2 Internal Candidates – SATH interviews only

- 6.2.1 All staff will be eligible for reimbursement of additional expenses (in excess of normal home to work mileage) incurred in attending an interview at the rates set out above.
- 6.2.2 Where the interview is during an individual's scheduled working day, the individual should discuss the request with their manager and paid special leave should be granted for the time required or be taken as annual leave if more than just the interview time is requested. In other cases, the time taken will be in the individual's own time.

7. Claims Procedure

- 7.1 Receipts will be required for all expenditure, subject to the conditions set out in this policy; incurred whilst attending the interview. Completion of the travel expense form, itemising expenses incurred and attaching receipts is required (Appendices A and B). The form should be returned to the appointing manager within 4 weeks of the interview taking place, who will check, authorise and forward the claim to Pay Services as soon as possible, but at the latest within 10 working days of receipt.
- 7.2 Payment will be made by cheque or BAC's to external candidates and via payroll to candidates already employed by the Trust. The costs will be charged to the appointing manager's cost centre.
- 7.3 Reimbursement will be paid to all candidates making a claim regardless of whether they are subsequently appointed to the post.

8. Training Needs

There is no mandatory training associated with this guidance. If staff have queries about its operation, they should contact their line manager in the first instance.

9. Review Process

The Trust will review this policy when there are changes to good practice, or within the normal policy review cycle.

In order that this document remains current, any of the appendices to the policy can be amended and approved during the lifetime of the document without the document having to return to the ratifying committee.

10. Equality Impact Assessment (EQIA)

An Equality Impact Assessment has been carried out on this policy and it does not have any significant impact on any of the protected characteristics as defined by the Equality Act 2010.

Appendix A

CLAIM FOR EXPENSES

SHREWSBURY & TELFORD HOSPITAL NHS TRUST

<p style="text-align: center;">COMPLETE THE DETAILS IN THIS SECTION BEFORE SUBMITTING CLAIM (DETAILS OF CLAIM TO BE RECORDED OVERLEAF)</p> <p>ASSIGNMENT SURNAME (BLOCK LETTERS) FIRST NAME NUMBER</p> <p>DESIGNATION</p> <p>HOSPITAL DEPT</p> <p>HOME/ ADDRESS</p> <p>.....</p> <p>VEHICLE DETAILS</p> <p>MANUFACTURER MODEL</p> <p>ENGINE CAPACITY c.c. REG NO.</p>	<p style="text-align: center;">BANK DETAILS FOR PAYMENT.</p> <p>BANK NAME</p> <p>SORT CODE</p> <p>ACCOUNT No</p> <p>ACCOUNT NAME</p> <p>CLAIM TYPE</p> <p>INTERVIEW = I, VOLUNTEER = V, COURSE = C <input style="width: 30px; height: 20px; border: 1px solid black;" type="checkbox"/></p>
<p>I CERTIFY that advice on the handling of the emergencies were given before starting my emergency call-out journeys and I accept full responsibility for those aspects appropriate to my duties from that time. (Journeys which I do not consider to qualify for tax relief are indicated with an 'E'): and I declare that:</p> <p>(a) The travelling and subsistence allowances claimed are in accordance with National Health Service Regulations and Whitley Council Agreements, and are in respect of expenses actually incurred whilst engaged on the business stated.</p> <p>(b) The insurance policy current throughout the period of this claim provided, whilst the vehicle was used on official business, full third-party insurance cover against risk or injury to, or death of passengers and damage to property. I undertake to indemnify the Authority in respect of any claim made against me For which my insurance policy does not provide cover.</p> <p>(c) (i) On the occasions where day allowances are claimed I necessarily spent more on meals than if I had been at my permanent station and</p> <p>(ii) Where an allowance for a period of more than TEN hours is claimed I necessarily incurred expenditure on an additional meal.</p> <p>Signature:</p> <p>Date:/...../.....</p>	<p>Notes</p> <ol style="list-style-type: none"> 1. It is absolutely essential that all parts of this claim form are completed in FULL. Any omissions will result in the claim being returned to your manager for completion, with payment being deferred by one month. No advances will be made against late or incomplete forms received, under any circumstances. 2. Each claim submitted must cover one calendar month only; claims which cover any other period will be returned with a request to be resubmitted in the correct format. 3. This claim must be received in the Travel Expenses Dept., 2 Douglas Court, Anchorage Avenue, Shrewsbury Business Park, Shrewsbury, SY2 6LG by the 10th of the following month, otherwise payment will be delayed by one month. 4. Payment will be made at the END of the following month, via Salary slip. 5. Receipts must be provided where applicable for Train & Taxi fares, meals, parking, tolls etc. 6. For Tax & National Insurance purposes, it is not sufficient for Nature of Business to be described as 'work'. Please give an indication of the purpose of the journey i.e., Clinic, Theatre List, Course. etc.
<p>I certify that to the best of my knowledge and belief, the claimant was engaged on the service or business Stated on the dates shown, and that the amounts claimed are in accordance with the NHS (Travelling Allowances) etc. Regulations and Amendments thereto.</p> <p>SIGNATURE:</p> <p>PRINT NAME: DESIGNATION MANAGER:</p> <p>DEPARTMENT: DATE:/...../.....</p>	<p style="text-align: center;">_____</p>

DATE	NATURE OF BUSINESS (Study leave, Att. mtg., visit Patient, seminar, course, Interview etc.	ITINERARY OF JOURNEY OR NATURE OF EXPENSE 1. The starting point, places visited and the finishing point must be shown in the order visited. 2. For passenger's mileage record the name and designation of passenger.	PRIVATE VEHICLE MILEAGE					MISCELLANEOUS EXPENSES			SUBSISTENCE ALLOWANCE			
			OFFICIAL MILEAGE	HOME TO BASE MILEAGE	Passengers		Name of Passengers	T=TAXI R=RAIL B=BUS C=CAR PARK	£	p	TIMES OF ABSENCE ON BUSINESS & AMOUNT CLAIMED MUST BE SHOWN TIMES (HRS)			
					Miles	No.					FROM	TO	£	p
TOTALS:														

Manual Payment Request Form

Supplier Name	
Supplier Address (inc Postcode)	
Invoice/Document No.	
Invoice/Document Date	

PAYEE DETAILS	
Sort Code	
Account No.	
Account Name	
E-mail address for remittance advice	

OR

Cheque Payee Name	
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Reason for Payment	
Amount	
Budget Code	

Requested By	
Approved By	