

Reimbursement of Travel and Other Expenses Policy

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1. Introduction

The purpose of this policy is to ensure that travel and entertainment expenditure for legitimate business purposes is properly reimbursed and to ensure that these expenses are treated appropriately for tax purposes.

2. General procedure

The College will reimburse actual expenditure that is incurred wholly, necessarily and exclusively in connection with authorised duties that are undertaken on behalf of the College.

To claim expenses, you must use the College expenses form – see **Appendix B**.

Expenses claims will not be paid unless supporting evidence is provided.

When claiming for travel expenses, tickets, or other evidence of the full journey i.e. from / to destinations, together with the amount paid, must be provided.

Where possible, travel should be booked well in advance to benefit from any discounts for early booking.

All claims must be supported by receipts and signed off by the line manager before submission to the Finance Department for processing and payment.

The College may return an expense claim to the claimant if it lacks the necessary supporting evidence or is not compliant with this Expenses Policy.

Expenses must be submitted **within 3 months** of the expense being incurred. Late claims will only be paid in exceptional circumstances.

The College will pay claims into the claimant's bank account that has been provided to the College, and the claimant will receive a Remittance Advice confirming payment.

3. Travel

3.1. General

Employees and line managers should consider whether travel is necessary to meet business objectives or if there are more appropriate means e.g. tele- or video-conferencing. Such alternative arrangements may be necessary to meet EDI considerations.

3.2. Air

Personal preference of airline or incentives or rewards associated with specific forms of air travel, such as the collection of air miles, should not be a factor in determining which flight is purchased for College business.

The key consideration is whether a selected flight is the most cost-effective for the College, unless there is a valid and justifiable business reason for taking an alternative flight.

For the purposes of reducing the College's carbon footprint, claimants travelling on College business are encouraged not to travel by air.

Air travel will not normally be acceptable when the departure and destination are less than 500 kilometers (or 300 miles) apart.

Air travel within Europe, or flights under 4 hours, must be in economy class.

Inter-continental air travel may be in "economy-plus", or similar.

The College will not refund the costs of "business" or "first class" air travel.

3.3. Rail

Travel will ordinarily be reimbursed at Standard Class rates unless the one-way distance exceeds either 500 kilometers (300 miles) or is scheduled to take 5 hours or more, in which case First Class rail travel is permitted.

3.4. Bus/Taxi/Tube

Tickets, receipts and/or journey statement will be sufficient for evidence of the journey.

Taxis should be used only when deemed necessary for practical purposes or for safety.

3.5. Use of your own car

It may be appropriate and cost-effective to use your own car when travelling on College business, for example, where there is limited public transport to your destination, or the journey time is significantly shorter than using public transport.

Where staff are using their own cars to travel on College business, they must ensure that they have the appropriate levels of motor insurance. Vehicles must be kept in a roadworthy condition.

The College will not pay for the cost of any insurance policy, or insurance excess, on your own car for business travel.

To claim for mileage, you should set out the distance of the journey undertaken on the College expenses system (postcode/location of journey from and journey to destination).

The College will pay a mileage allowance, please see **Appendix A** for allowances currently paid. Petrol costs will not be reimbursed.

The College will pay for tolls, congestion charges and parking costs incurred, where applicable, when travelling on College business. The College will not reimburse fines incurred whilst using a vehicle on College business.

3.6. Hire Cars

You should seek authorisation from the College Accountant or Bursar should there be no alternative to car hire.

Personal preference of vehicle or incentives or rewards associated with specific forms of car hire should not be a factor in determining which car hire firm or vehicle is booked for College business.

The key consideration is whether the car hire firm and vehicle is the most cost-effective for the College, unless there is a valid and justifiable business reason for an alternative car hire firm or vehicle.

4. Academic Allowances

Fellows or members of staff entitled to academic allowances should ensure that authorisation for travel and other costs, such as registration fees for conferences, are within allowance limits.

All claims for incurred costs must be made using the College expenses form – see **Appendix B** – which should be submitted via the Accounts Team to the Senior Tutor for authorisation prior to reimbursement.

Details of items for which the costs may be reclaimed are set out in Academic Allowances and Expense Claims – see **Appendix C**. Further details are set out in the **St Hilda's Tutors' Guide**.

For the avoidance of doubt:

- Expenses must not be reclaimed until actual costs have been incurred.
- All claims must relate to personal expenditure and not for colleagues, family members, friends, or travelling companions.
- Claims for personal or household property will not be reimbursed.

5. Meals/accommodation

If you are required to be away from home overnight on college business, you may claim for:

- breakfast (if this is not included in the hotel room rate);
- lunch
- dinner

You should supply detailed itemised receipts / invoices for all hotel and meal expenses; Credit/Debit card statements will not be accepted as proof of expenditure.

Please see **Appendix A** for current allowances. Amounts are inclusive of drinks.

The meal and hotel allowances set out in **Appendix A** also apply when travelling overseas on College business.

Claims should be made in the currency in which the expense has been incurred.

All receipts must still be provided and, as applicable, bank or card statements should be provided with the foreign exchange conversion rate for reimbursement, or the currency exchange rate receipt.

The College will reimburse the cost of necessary travel visas required for travel on College business.

The College will provide business travel insurance for any overseas trips authorised by the College.

The College will not reimburse the costs of an employee's passport.

6. Business entertainment

The College recognises that corporate entertainment can provide opportunities to strengthen relationships, enhance the College's reputation and deepen prospective stakeholder' or suppliers' understanding of the College. It is preferable that any entertainment booked for stakeholders, suppliers, or other business contacts is approved in advance, but this may not always be practical. In any case, you should submit:

- details of the individuals whom you wish to invite;
- the name of the organisation that they represent;
- the nature of the entertainment, including date, location and cost; and
- the reasons for the entertainment.

The College will only approve entertainment proposals that demonstrate a clear business objective and that are appropriate for the nature of the relationship with the College. The College will not approve business entertainment where it considers that a conflict of interest may arise or where it could be perceived that undue influence or a particular business benefit is being sought for example, prior to a tendering exercise.

Pre-authorised expenses incurred in delivering the authorised entertainment to College stakeholders, suppliers or other business contacts will be reimbursed in line with the General Procedure at paragraph 2.

For gifts received, please refer to the **Gift Acceptance Policy** for further details.

7. Expenses that will not be reimbursed

The College will not reimburse the following:

- the cost of any travel undertaken for personal reasons;
- the cost of any travel or other expenses for claimant's partner or spouse;
- any fines or penalties incurred while on College business for whatever reason, including penalties for not paying for a rail ticket in advance of boarding the train and penalties or fines associated with motoring offences, including speeding or parking fines, clamping or vehicle recovery charges;
- any expenses incurred for personal benefit or to improperly influence or reward a business contact;
- cash advances or withdrawals from an ATM machine.

You will be required to pay for any travel and other costs incurred by your partner or spouse if they accompany you on College business.

The College will not provide any form of travel insurance for your spouse or partner.

8. False claims

If the College considers that any expenditure claimed was not legitimately incurred on behalf of the College, it may request further details from you. The College will thoroughly investigate and check any expenses claim as it sees fit. The College may withhold payment where insufficient supporting documents have been provided.

Any abuse of the College's expenses policy will not be tolerated and may lead to disciplinary action.

Types of abuse include, but are not limited to:

- false expense claims;
- claims for expenses that were not legitimately incurred;
- claims for personal gain;
- claims for hospitality and/or gifts to induce a partner or other business contact to take improper action; and
- receipt by you of hospitality and/or gifts from business contacts that may be perceived to influence your judgment in performing your College duties.

Appendix A

1. Mileage Allowance

The College pays £0.55 per mile for mileage incurred wholly and exclusively on College business. This is the current HMRC approved rate

2. Meals/Accommodation

You may book hotel accommodation of up to £150 per night (unless otherwise agreed in advance by your line manager or budget holder) for UK stays relating wholly and exclusively to College business.

Rates are inclusive of VAT and breakfast.

If you are required to be away from home overnight on College business, you may claim up to:

- £15 for breakfast (if not included in the hotel room rate)
- £20 for lunch
- £40 for dinner

Please note the above amounts are inclusive of drinks.

Overseas accommodation should be agreed in advance by your line manager or budget holder, taking into account rates that could be considered reasonable.

Appendix B

Expenses / Academic Allowance / Entertainment Allowance

Reclaim Form

The following form can be used by staff claiming authorised expenses and by Fellows and Lecturers who have access to academic or research expenses (up to the individual entitlement as stated in your contract). These are used for expenses incurred in the provision of teaching or research activities, such as books and conference travel. The College follows either its own "Reimbursement of Travel and Other Expenses Policy" or the University policy for expenses, see <[https://finance.admin.ox.ac.uk/claimants-expenses-guidance#/>. Where these policies are contradictory the College's policy will prevail. The College allows the use of academic/research allowances for the purchase of laptops or tablets and for membership of academic societies. However purchases that are not wholly for research or teaching, or expenses for travel and accommodation to/at normal places of work, are not allowable expenses and may be deemed taxable benefits.](https://finance.admin.ox.ac.uk/claimants-expenses-guidance#/)

All expenses claimed must have been incurred wholly on College business. Claims should be submitted as soon as possible after the expenses are incurred and within the same financial year (the College financial year runs from 1 August to 31 July). Please see more information at <<https://tinyurl.com/yv2t3xmz>>.

Please ensure that all receipts are attached.

Name of Claimant:

Nature of Expense	Expenses	Academic	Entertainment	Nominal Code	Cost Centre
Total					

I confirm that I have read the information above, and at the link provided, and that I incurred this expense wholly for College use. I understand that this form will be sent to my line manager for authorisation.

Please complete bank details if you are a new payee.

UK Bank Account:.....
(Payment can only be made to a UK Bank Account)

Sort code:.....

Claimant's Signature:

Date:.....

Line Manager's Signature:.....

Date:.....

Appendix C

Academic Allowances and Expense Claims

Academic Allowance

The amount available to an academic is set out in their contract of employment. The Finance office can provide confirmation of the amount available and can be contacted at emailing: accounts.office@st-hildas.ox.ac.uk

The Allowance claim year runs from 1 August to 31 July and any unspent allowance cannot be carried forward to future years. Claims for reimbursement of expenditure should be submitted using the online form. Supporting paperwork must also be submitted. Reimbursements will be paid directly into your bank account.

IT Equipment

The College provides basic IT equipment for those with College rooms. More specialist computing and software items will need to be purchased through the Academic Allowance and all such items will remain College property.

Research Support

Research Support includes, for example, using a proof reader or a research assistant. If the proof reader or assistant is neither registered as self-employed with HMRC, nor working through a limited company then they will need to be paid through the College payroll, with tax and national insurance deducted. **Prior to** any such work of this nature being undertaken the Finance office must be contacted to confirm the appropriate procedure for payment.

Entertainment Allowance

In cases where the College provides an Entertainment Allowance, this is to be used primarily to cover expenses for entertaining students (UG or PG, from College or outside) but also to cover guest speakers, academics and collaborators; and other official visitors, such as potential or existing donors.

If available, the amount is specified in an individual's contract of employment. The Finance office can provide confirmation of the balance available and can be contacted at: accounts.office@st-hildas.ox.ac.uk

The Allowance claim year runs from 1 August to 31 July and any unspent allowance cannot be carried forward to future years. Claims for reimbursement of expenditure should be submitted using the online form. Supporting paperwork must also be submitted. Reimbursements will be paid directly into your bank account.

Items not covered by the entertainment allowance

The costs of entertaining a partner or friend at an SCR meal are personal expenses and will be charged to your battels.

Please see also clauses 2.12 and 2.14 of the [Tutors' Guide](#).