

Claiming your expenses: What you need to know

Claiming your expenses has advice about the expenses scheme for residential schools staff, including items covered and how to claim reimbursement. Please read this advice carefully as the Open University reserves the right to stop or limit reimbursement when the guidance has not been followed.

What can be claimed?

You can claim for travel and subsistence expenses incurred through your residential schools work only. Other expenses will only be reimbursed in exceptional circumstances and will require approval from the Head of Residential Schools.

Travel

Members of residential school staff are expected to use the most economical means of transport, having regard to the overall cost to the University and member of staff, both in money and time.

Unless travelling by car (see below) staff and tutors working at residential schools must book their travel through the residential schools team.

Full information on travel arrangements and the payment of travel expenses is provided in a separate document, 'Travelling to your residential school – what you need to know', which is available from <http://www.open.ac.uk/jobs/residential-schools/useful-documents>

Car

Staff travelling to residential schools by car do not need to seek prior approval providing that it can be demonstrated that this is the most economical means of travel. Travelling by car is reimbursed at the University rate and mileage should be calculated using a route planner such as <http://www.theaa.com/route-planner/index.jsp> or <http://www.rac.co.uk/route-planner/>. An additional allowance can be claimed for any named passengers. All passengers must be engaged in residential schools work and will not be able to claim travel expenses for this journey.

The University does not insure employees' vehicles used for travel during the course of University business. The mileage allowance includes an element for insurance, and you are responsible for making arrangements to cover any business use of your vehicle.

Other forms of travel

If travelling by car is not the most economical means of transport or driving is not possible, then alternative forms of travel can be used. Other travel expenses are reimbursed at cost price and proof of purchase must be provided.

Subsistence

Subsistence is defined as meals and overnight accommodation. Both of these are provided free of charge at residential schools and subsistence claims for expenses incurred during the school period can only be made in exceptional circumstances.

If it is necessary to purchase subsistence items outside the start and end dates of your appointment

i.e. whilst travelling the University will reimburse only what is considered to be a reasonable level of expenditure please see T & S Rates: Reasonable Expenses for details of current amounts.

In all cases expenses claimed must be reasonable and proof of purchase must be submitted with the claim form. The University reserves the right to disregard claims if receipts or relevant documentation are not provided.

Postage, alcoholic drinks, tobacco, telephone calls, newspapers, and laundry charges will not be reimbursed.

Additional Nights of Accommodation

You are not required to stay for an additional night at the start or end of your school unless you have been appointed to consecutive schools at the same venue. If this is the case your accommodation is provided free of charge at the venue and you cannot be reimbursed for returning home between schools.

If you need additional accommodation for any other reason or accommodation outside of the school venue this should be discussed and arranged with the Residential Schools Team in advance. Additional accommodation is available in exceptional circumstances only and is not available to any other party.

Where there has been an exceptional agreement for additional accommodation which cannot be arranged by the Residential Schools team in advance, reimbursement will be made for a reasonable amount only. Please see T & S Rates: Reasonable Expenses for guidance on acceptable costs.

Expenses in a Foreign Currency

If any appropriate expenses are incurred and charged in a non-sterling currency, please note the Residential Schools Office will use the HMRC official exchange rates in all cases.

HMRC publish their official exchange rates for each month for all countries and your expense claim will be calculated using these figures, based on the month the school begins. The exchange rates can be found at:

<https://www.gov.uk/government/collections/exchange-rates-for-customs-and-vat>

Incidentals

Staff are expected to minimise claims for expenses through being economical and avoiding excessive spending. Residential school staff should endeavour to get approval in advance for any unavoidably high costs.

The Head of Unit, or Residential Schools Team, will ask for an explanation of any expenditure which appears to be excessive when compared to the guidance amounts and may withhold partial reimbursement, or prohibit similar claims in future, if expenditure is found to be unreasonable.

How do I claim?

Receipts are accepted in a variety of forms but they must itemise expenditure; credit card and bank statements are not accepted. Where receipts may not be available for certain items (i.e. tube or bus fare) sufficient information must be provided to explain any un-receipted items. All receipts must provide sufficient evidence of the expenditure for the journey taken or subsistence claimed.

Missing proof of purchase may delay your claim being processed or lead to the amount reimbursed being reduced. Please remember that all expenses should be submitted within two months of the end of the school and that the University reserves the right to disregard expenses submitted without good reason after that time. Expenses submitted more than four months after the end of the school may be liable for tax.

Please remember that items do sometimes go missing in the post. You are advised to keep a copy of your claims form and of any related proof of purchase.

Internal Salaried Staff

Internal salaried staff of The Open University (excluding Associate Lecturers) should claim expenses using the online expenses system (see below).

All other appointees – including Associate Lecturers – will be provided with an expenses claims form at the school. Please note that Associate Lecturers must only use the residential schools expenses claims form: claims submitted using the standard Associate Lecturer claims form or through TutorHome will not be accepted.

Internal salaried staff of The Open University should claim expenses using the online expenses system: <http://intranet.open.ac.uk/expenses> Claims submitted using the residential schools claims form will not be accepted.

If you are accessing the site remotely you will need your Open University computer username (OUCU) and network password.

Please note that internal salaried staff must use the online system:

To claim online, sign on and from the main menu select 'Make a New Claim'. Please check that the personal details shown are correct and select one of the four options from the toolbar along the top of the window: Mileage; Other Travel; Subsistence; or Incidentals. You can then enter your claim details.

For each claim **you must provide a valid budget code**. To help you, budget codes are provided below for each academic unit or host centre. Please use the appropriate code for the type of appointment to which the claim relates.

To ensure your claim is dealt with promptly, please send an email alert to the Residential Schools Administrator in the appropriate academic unit or host centre (see below) and forward them any relating receipts/proof of purchase.

The online expenses system gives you the option to send an email alert before you exit. To help you, email addresses are provided below for each academic unit and host regional/national centre.

Online claims – residential schools teaching appointments (Module Director, Tutor, Demonstrator, Academic Assistant, etc.). Not FBL appointments.

Languages

Budget Code: EL14 1601 [module code]

Email: WELS-TSE-Non-research@open.ac.uk

Send receipts to: Jo Miller,
Stuart Hall Building, Walton Hall

Undergraduate Technology

Budget Code: SN14 1601 [module code]

Email: Abi.lewis@open.ac.uk

Send receipts to: Abi Lewis, Faculty Maths,
Computing and Technology

T885 Postgraduate Technology

Budget Code: SN14 1601 T885

Email: stem-res-schools-T885-TS-Claims@open.ac.uk

Send receipts to: T885 Module Manager,
Venables Building, S1061

Online claims – residential schools regional appointments (School Director, School Administrator, Learning Adviser, plus FBL appointments (including tutors, School Directors and Residential School Support Manager (RSSM))

OU Business School

Budget Code: LM14 1601 [module code]

Walton Hall – University of Bath

Budget Code: BL03 1601 0

Walton Hall – Alicante

Budget Code: BL14 1601 AC

Walton Hall Vernon

Budget Code: BL14 1601 VN

Walton Hall – Jena

Budget Code: BL14 1601 JE

Email: SS-RS-Team@open.ac.uk

Send receipts to: Residential Schools and Auxiliary Aids & Services, Ground Floor, Henshaw Building, East Campus

Advice on claiming expenses

Please contact Residential Schools Team
by phone: +44(0)1908 653 235
by email: residential-schools@open.ac.uk