

Travel and Expenses Guidance

Employees and Volunteers

Guidance applies to:		Employees: All	Volunteers: All
		Contractors: Refer to contract.	Other: Service Users involved in initiatives where the Society has agreed to cover expenses.
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Introduction

This document must be read alongside the Travel and Expenses Policy, which explains who is eligible for claiming expenses and travel costs. If you are eligible, this guidance document gives details and the latest guidelines and information on the topics covered in the policy. The policy has additional information on each of the points below. Use this document to find what you can and can't claim for.

Travel Guidance

Travel expenses cannot be claimed for what is considered ordinary commuting. HMRC explains that any "regular pattern of travel" would be considered travel to a "permanent workplace" and therefore would be ordinary commuting. This is why ad hoc travel is acceptable and claimable, but any "regular pattern of travel" would not. Please see below for some examples of what would and would not be considered a regular pattern of travel:

Regular pattern of travel

- Travelling every Thursday to the same office/location
- Travelling every other Tuesday to the same office/location
- Travelling to Crutched Friars on 5th of every month
- Travelling to Crutched Friars on 5th June, Birmingham on 5th July and repeating this pattern every other month

Not a regular pattern of travel

- Travelling to Crutched Friars for a team meeting on 1st June, Birmingham on 1st July, working from home on 1st August and 1st September, Birmingham on 1st October (no regular or repeating pattern)
- Going to the Birmingham office every day for two weeks only, to complete a limited time project

You can find some more examples [here](#) on Gov.UK.

Everyone must ensure that they adhering to HMRC rules by not undertaking a regular pattern of travel where they claim for travel costs. Adhering to this is a requirement and protects Society and individual employees from fines and other consequences if we were audited and found to have breached these rules. **Please note:** Where service contracts explicitly dictate that we must travel to a certain location for a certain task, such as Singing for the Brain events, this travel is claimable. If you are unsure or have any questions, please speak to your People Advisor or Finance Business Partner.

Trains

Train journeys must be booked through our approved travel provider, unless the value is less than £20, in which case you may purchase the ticket and claim via the expenses system. For more information on how to book trains, visit the How to Book Travel [Arena page](#).

What we will pay for:	What we will not pay for:
The best value fare for the journey you intend to make.	Season tickets*
	Flexible or full fare tickets unless they are cheaper than restricted tickets or it is impossible to predict the time at which you will be available to travel.
	First class tickets unless they are cheaper than the cheapest available standard class ticket.
	Personal railcards (such as annual Network or Young Person's railcards)*

Bus

What we will pay for:	What we will not pay for:
Single journeys or, where appropriate, travelcards.	Bus passes*

* There are tax implications associated with the Society paying for these items. For this reason, we are unable to reimburse their costs.

London Underground/Overground

What we will pay for:	What we will not pay for:
Single journeys or, where appropriate, travelcards, for travel in London.	The initial cost of an Oyster card. These are no longer required to travel on London's public transport network.
	Auto-top up sums. We will only pay for individual journeys claimed through the expenses process.

Car Mileage

What we will pay for:	What we will not pay for:
Claims that are incurred entirely for your work or volunteering activities.	Any costs associated with insurance, maintenance, MOT testing, or other vehicle running costs . This includes any additional insurance costs associated with driving for business.
Claims accompanied by departure and arrival postcodes . The mileage claim must be for the shortest practical distance between the two locations. If there is a justifiable reason why the shortest route has not been used, a brief rationale for this should be included. Claims will be subject to random checks and may not be paid if the claim is incomplete or inaccurate. Google Maps will be used to verify the mileage claimed.	Fuel where you are claiming mileage. Mileage claims that are not accompanied by departure and arrival postcodes, will be rejected.
You can claim mileage** expenses at a rate of 55p per mile for the first 10,000 business miles in the tax year.	Parking or driving related fines even when incurred on Society business.
Any mileage over 10,000 business miles will be paid at 25p per mile. ***	

Motorcycles can claim 24p per mile for all eligible miles on Society business.	
Cycles can claim 20p per mile for all eligible miles on Society business	

***We reserve the right to review and change the applicable mileage rate or criteria at any time in line with HMRC guidance.*

****If you are claiming mileage from more than one employer in a tax year, the miles are cumulative for all your roles, so you will need to keep track of your cumulative miles to make sure you claim at the correct rate.*

Bridge, road and tunnel tolls and congestion/clean air zone charges

What we will pay for:	What we will not pay for:
Tolls incurred on Society business	Parking or driving related fines even when incurred on Society business.
Clean air zone charges, that are incurred while driving across locations to perform your role.	Clean air zone charges, that are incurred in your normal home to office commute.

Parking

What we will pay for:	What we will not pay for:
Parking, where you are required to drive to a location which is not your usual place of work , and no free parking is available.	Parking related fines even when incurred on Society business.
Parking, where you are a volunteer, and you are required to drive to a location where no free parking is available .	Free parking is available within reasonable walking distance of your destination.
	You are an employee and are parking at your normal place of work

Hire cars

What we will pay for:	What we will not pay for:
The cost of the hire car when booked through our appointed travel booking agency.	You can't claim mileage allowance for hire cars
We will reimburse costs for a full tank of petrol, as required when returning the car.	

Taxis

What we will pay for:	What we will not pay for:
Where several people travel together , and a taxi is cheaper than any other mode of transport.	Taxis used in circumstances not listed in this table.
Where a taxi is the only viable means of transport	
Where your security would be compromised by not using a taxi, for example when travelling alone, after dark.	
Where heavy items are to be transported and there is no other way of transporting them.	
If you have mobility restrictions and are required to travel to a location that is not accessible to you without using a taxi.	

International Travel

What we will pay for:	What we will not pay for:
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Economy class or equivalent tickets	Business or first-class tickets unless you have prior approval from the CEO or Chair of the Board of Trustees.
If you are travelling with a carrier that charges for luggage the Society will pay for an appropriate amount of luggage based on the length of the trip.	Passport renewals
Visas required for travel	Personal travel insurance. ****
Accommodation for your trip , provided it is booked via our appointed travel provider .	

**** Travellers on business are covered by the Society's corporate travel insurance.

Read the [International Travel Guidance](#) document on Arena before planning your trip.

Accommodation:

If you are travelling to London, you should try to avoid Tuesday and Wednesday nights as these are generally the most expensive nights of the week.

What we will pay for:	What we will not pay for:
Hotels up to £165 including VAT . Hotels in Central London £225 Including VAT .	Room service

Subsistence

What we will pay for:	What we will not pay for:
Up to £8.50 for breakfast with an itemised receipt	Any amounts above the thresholds outlined.
Up to £10 for lunch with an itemised receipt.	Alcoholic drinks.
Up to £30 for dinner with an itemised receipt.	
Tips/service charges – we will pay a maximum of 12.5% gratuities, as long as this is within the overall allowance listed above, provided this charge is an itemised line on the bill.	Optional service charges. If you have chosen to add a gratuity, without it being presented on the bill, we will not reimburse you.
Refreshments if you are required to meet a volunteer, employee or person affected by dementia in an off-site location because there is no local office. We will reimburse up to £10 per person per day when accompanied by an itemised receipt and clear details submitted with the claim.	Refreshments where you have chosen to go off site, but it is not required. We will not pay for any alcoholic drinks.
Meals (using the amounts described above) when travelling on Society business.	Meals if you have chosen to extend your travelling to include non-Society activities.

Hospitality

What we will pay for:	What we will not pay for:
Reasonable expenses where this is absolutely necessary and appropriate in the circumstances. See the Gifts and Hospitality Guidance.	Any claims that were not approved by a Director or Associate Director prior to being incurred.

Gifts

What we <i>will</i> pay for:	What we <i>will not</i> pay for:
Up to £35 to cover gifts and/or cards sent on behalf of the Society in compassionate circumstances. Any gift expenditure will come out of local budgets.	Any other costs, e.g. birthday cakes, leaving cards or other team-related gifts including prizes.

Home-based staff

What we <i>will</i> pay for:	What we <i>will not</i> pay for:
Stationery (e.g. pens, paper, stamps) that costs £10 or less can either be claimed on expenses or ordered via Banner .	Home printers, ink or broadband. (via expenses claims)
Up to £88 for a new desk and/or £66 for a chair, £82.50 for a monitor, £5.50 for an HDMI lead (all figures inclusive of VAT)* where no suitable equipment can be sourced from the Society's existing stocks. Expenses for this equipment must be approved following our approval process for these items using this form . Following approval, your line manager should email this along with copies of proof of purchase for the equipment to our payroll team at payroll@alzheimers.org.uk . Should your equipment be subsequently damaged or broken, we encourage you to check if the product is under warranty and can be repaired, before ordering any replacement equipment. Whenever practical and possible to do so, the product should be repaired under warranty**.	
Other IT equipment needed as a result of a DSE assessment and ordered through our Office Supplies provider as per the Home Working Guidance	
Necessary equipment agreed as part of the Society's Reasonable Adjustments process – items agreed through this process will be purchased centrally as opposed to claimed individually through expenses.	

Community-based staff

What we <i>will</i> pay for:	What we <i>will not</i> pay for:
Stationery (e.g. pens, paper, stamps) that costs £10 or less can either be claimed on expenses or ordered via Banner .	Home printers, ink or broadband. (via expenses claims)
Up to £88 for a new desk and/or £66 for a chair, £82.50 for a monitor, £5.50 for an HDMI lead (all figures inclusive of VAT) * where no suitable equipment can be sourced from the Society's existing stocks. Expenses for this equipment must be approved	All costs of journeys undertaken on public transport, in line with this policy and guidance.

following our approval process for these items using [this form](#). Following approval, your line manager should email the along with copies of proof of purchase for the equipment to our payroll team at payroll@alzheimers.org.uk. Should your equipment be subsequently damaged or broken, we encourage you to check if the product is under warranty and can be repaired, before ordering any replacement equipment. Whenever practical and possible to do so, the product should be repaired under warranty**.

* For home and office-based employees, please note that these costs are paid via the Payroll team and considered a benefit by HMRC (Tax and NI are therefore due and will be paid for you by Payroll).

** Please note that we reserve the right to decline multiple requests for replacement equipment.

Office-based staff

What we will pay for:	What we will not pay for:
The cost of any journeys that are substantially different from your usual commute.	The cost of your commute to the office.
	If the journey you are making is substantially the same as your commute, we will only pay any incremental additional costs above the cost of your usual commute.
	Any costs incurred from occasional home working.

Further information

Refer to the Travel and Expenses Policy for further details on the information in this document. Speak to the Policy Owner, or your Line Manager for further support.

Supporting documents

[Travel and Expenses Policy](#)

[Travel and Expenses Line Manager Guidance](#)

[Gifts and Hospitality Policy](#)

[Counter Fraud, Anti-Corruption and Bribery Policy](#)

Document details

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Sponsor	Chief Finance Officer
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