POSITIVE FUTURES

ACHIEVING DREAMS. TRANSFORMING LIVES.

Name of Procedure:	Procedure for staff and volunteers in adult services on being reimbursed for using their vehicle for journeys with, or on behalf of, the people we support
Policies this procedure is governed by:	• Vehicles Policy • Personal Finances Policy and Procedure – Supported Living Services
Lead Person:	Finance Director
Next Review Date:	30.06.29

Change Record

Issue Date	Nature of Change	Ratified by	Date ratified
16.09.13	First issue	MD	12.09.13
17.01.17	Removal of key points; no other changes	MD	05.12.16
27.05.22	Policy reference updated	CE	25.05.22
30.06.26	Mileage rate increased to 50p per mile for journeys taken on or after 01.07.25	Directors	11.06.26

Procedure for staff and volunteers in adult services on being reimbursed for using their vehicle for journeys with, or on behalf of, the people we support

Aim

To outline the process for staff and volunteers in adult services to charge the people we support for journeys made using the staff member's own vehicle (with them or on their behalf) and how these journeys are recorded, authorised and paid.

Context

Using staff vehicles can provide the people we support with a flexible and economical solution to their transport needs. This procedure ensures that payments are made promptly and all transactions are properly recorded and authorised.

This procedure has been developed following consultation with staff and the people we support.

Procedure

Positive Futures will charge the people we support for journeys taken in a staff member's vehicle or for journeys taken by the staff member on their behalf.

The staff member will issue a Positive Futures invoice and the person we support will pay the member of staff directly.

Every house in Supported Living Services will have a Positive Futures duplicate invoice book. In Peripatetic Services, each staff member will be issued an invoice book.

Staff will ensure that:
- A Positive Futures invoice is completed for every journey, including the date of the journey; details of the journey; distance travelled; which people we support travelled in the vehicle; agreed mileage rate or fixed charge; and the total cost.
- The invoice is signed by the staff member and the person we support (where they have capacity to do so).

- Where a journey involves more than one person we support, a separate invoice must be completed for each individual, showing an equal share of the total cost.

If the person we support manages their own money:
- Their consent to this procedure should be recorded in the Support Agreement.
- The invoice is given to the person we support.
- The person we support pays the staff member on the day of the journey.
- The staff member marks the invoice “PAID” and initials it.
- Where appropriate, the payment and invoice is recorded and placed in the finance records kept by the person we support.

If the person we support does not manage their own money:
- Their representative’s consent to this procedure should be recorded in the Support Agreement.
- The payment is entered on the person we support’s Personal Finance folder transaction sheet.
- The invoice must be attached to the transaction sheet.
- The staff member takes the exact amount from the person’s cash tin on the day of the journey.
- If two members of staff are on shift, the second staff member should countersign the invoice and the payment.

The controls and checks around the finances of the people supported, including daily verification of cash balances, as set out in the Personal Finances Policy and Procedure – Supported Living Services should still be applied.

Review of invoice book

- The Deputy Service Manager or Coordinator should countersign the duplicate page in the invoice book to authorise the claim made.
- This should be done at least monthly.
- Staff members carrying their own invoice book should have these countersigned as soon as possible, at least monthly. Any discrepancies should be highlighted to the Service Manager.
- The Deputy Service Manager or Coordinator should not countersign the duplicate invoice page for any invoices for journeys they themselves have made. These should be authorised by the individual’s line manager.

- Each page of the invoice book will be pre-printed with an invoice number. Any missing pages should be reported to the Service Manager.
- Completed books must be retained in the Service office in line with the Records Retention and Disposal Schedule.
- Any invoices for journeys that have been paid for and are subsequently found to have been incorrectly invoiced (or are disputed by the person we support) shall be repaid by Positive Futures immediately to the person we support. The cost will then be recovered from the staff member.
- Unsubstantiated or dishonest claims will be treated as a disciplinary matter.

What mileage can be claimed?

Staff may only charge a person we support for journeys that are undertaken for that person's benefit and are not part of Positive Futures' core service delivery. This includes:

- Journeys where the person we support is travelling in the staff member's vehicle, for example, social outings or activities, personal appointments (such as hairdresser, shopping, visiting family or friends), or leisure / community activities
- Journeys made on behalf of the person we support where they are not present, for example, shopping, collecting prescriptions or medication, or other agreed errands.

Staff must not invoice a person we support for journeys that are part of their role, such as travel to meetings or training, or any journey that would be considered a normal work duty or organisational responsibility. Staff can claim for these journeys in line with the Expenses Claims Procedure.

Where more than one person we support benefits from the same journey, the total cost should be shared equally between them.

Mileage rates

We have separate rates for cars, vans and motorbikes.

Cars and Vans

On the first 10,000 miles in the tax year	50p per mile
On each additional mile over 10,000 miles	25p per mile

Motorcycles 24p per mile

The people we support and staff may agree to a fixed charge for particular journeys. These should be agreed between Positive Futures and the person we support (or their representative) and recorded in the Support Agreement. These fixed charges must NOT equate to more than 50p per mile for that journey.

Related documents

Forms / Templates
• Positive Futures duplicate invoice book (please request this from the Finance Department)