

Isle of Wight Adult Training Team Expenses Claims Policy

Version Control			
Version	Author	Ratified	Review
1.0	D Turner	Nov 2007	Nov 2009
2.0	D Turner	Oct 2009	Oct 2011

1. Purpose

- 1.1. The purpose of this policy is to set out clearly the costs that can be claimed by members of the Adult Training Team, how to complete the Expenses Claims Form, and when expenses should be claimed.

2. Statement

- 2.1. No member of the Adult Training Team should be expected to self-fund any administration or activity performed as part of his or her role within the Adult Training Team.

3. Qualifying Expenses

- 3.1. Any member of the Adult Training Team (County Training Manager, Local Training Manager, County Training Administrator, Training Advisers, Module Presenters or Module Facilitators) can claim any expense(s) they incur as part of their role within the Adult Training Team.
- 3.2. Such expenses may include the following: any materials, refreshments or mileage incurred for the purposes of delivering/facilitating on Training Modules; any materials (paper, envelopes, staples, ink cartridges, blank CD/DVD's etc) or postage incurred for the purposes of administration relevant to their role; or mileage incurred for the purposes of attending meetings relevant to their role.
- 3.3. Other items/expenses may be discussed with the County Training Manager, who at their discretion may grant permission for the costs to be paid.

4. Making a Claim

- 4.1. It is the individual Team Members responsibility to make any claim they feel is justified in respect of their role within the Adult Training Team.
- 4.2. In order to make a claim, the team member should complete the current version of the Adult Training Team Expenses Claims Form, which is available from the County Training Administrator, Local Training Managers, County Training Manager or the Training Pages of the County Website.

- 4.3. For all claims other than mileage a receipt **must** be clearly labelled and attached to the form when submitted.
- 4.4. Once completed the Adult Training Team Expenses Claims Form should be submitted to the County Training Manager for authorisation (instructions on how to complete the form are given in section 7 of this document).
- 4.5. In the absence of the County Training Manager (extended holiday, sickness or vacant appointment) claims can be submitted to the County Commissioner for authorisation.
- 4.6. Once authorised, the County Training Manager will pass on the Expenses Claims Form to the County Treasurer for payment to be made to the team member making the claim.

5. Time Scales

- 5.1. Unless the claim to be made is a large item/order for which the team member needs swift reimbursement, Expenses Claim Forms should be submitted quarterly at the end of February, May, August and November each year.
- 5.2. Once the County Training Manager has received the Expenses Claims Form, the claim should be authorised and passed on for payment within 5 days of receipt.
- 5.3. Once the claim has been received by the County Treasurer a cheque covering the cost of the claim should be raised, appropriate authorised signatories gained and sent to the claimant within 10 days of receipt from the County Training Manager.
- 5.4. If there is likely to be a delay in authorising/issuing payment for a claim, then the team member making the claim should be notified by the relevant individual (who is causing/managing the delay) with an estimated time of settlement of the claim.

6. Grievance/Complaints/Appeals

- 6.1. Should a member of the Adult Training Team be dissatisfied with a decision surrounding payment of a claim or time taken to settle a claim, their complaint/grievance should be sent in writing to the County Training Manager.
- 6.2. Upon receipt of the written complaint/grievance the County Training Manager should acknowledge receipt of the complaint within 7 days.
- 6.3. The County Training Manager is then responsible for investigating and resolving the issue, informing the

