

# Appointee Expenses Policy

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Policy author	Robert Shiell
Policy owner	Sharon Coyle – interim Director of People
Business Area	Appointee Management
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## **Why do we need the policy?**

This policy aims to ensure that all appointees have a clear understanding of their entitlements and requirements when travelling on Qualifications Scotland business and/or incurring expenditure on Qualifications Scotland's behalf.

## **Who is it for?**

Appointees (excluding invigilation appointees) and Qualifications Development Specialists (QDS)

## **What support is available?**

Support and advice is available from the teams detailed at the relevant sections within the policy.

General enquiries should be emailed to [am@qualifications.gov.scot](mailto:am@qualifications.gov.scot)

## **Linked Policies/Related Documents:**

Appointee Terms and Conditions of Appointment

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# 1 Introduction

As a public body, we have a responsibility to ensure that expenditure incurred in carrying out our business is reasonable and justifiable. We must also balance the needs of individuals who are required to travel with our commitment to sustainability.

This policy aims to ensure that we:

- safeguards the wellbeing, comfort, safety and security of appointees
- communicates our commitment to sustainability issues
- secures enhanced supplier service levels at the lowest possible cost
- consolidates expenditure to obtain discounted rates
- provides a fair and consistent approach to expenses payable to appointees

We are committed to equality of opportunity and to a culture that respects difference. We believe that, as an awarding and public body, we can play a leading part in promoting equality, diversity and inclusion by making them an integral part of our decision making. This policy has an Equality Impact Assessment completed on it at the development stage to assess how this policy may impact on equality groups and the findings from this are reflected in this policy.

## 2 Responsibilities

We are responsible for managing the checking, authorizing and processing of expenses claimed by appointees in line with this policy.

Appointees are responsible for ensuring they are familiar with this policy and for maintaining compliance.

## 3 Who does the policy apply to?

This policy applies to all appointees (excluding Invigilation appointees) and Qualifications Development Specialists.

## 4 General points about travel and accommodation requirements

All travel expenses must have been actually and necessarily incurred by you when undertaking business for us. Any claims received that do not conform to this policy will be amended.

You should ensure that your travel arrangements:

- make use of public transport wherever this is available
- support Government initiatives to reduce the environmental impact of travel
- are efficient and cost effective to us

## What must be booked by us

### Rail and ferry travel

Rail or ferry travel costing £50.00 (return) or more.

### Fast ticket machines

All rail tickets booked by us will be e-tickets unless there is no Fast Ticket Machine available at the departure station.

### Air travel and car hire

All air travel and car hire must be booked by us. We have a procurement arrangement in place which is designed to achieve cost efficiencies through negotiated Scottish Government rates.

Excess baggage charges will only be reimbursed when this is due to the traveller carrying our equipment/materials.

Car hire may be requested when:

- this is more cost-effective than other travel options
- the distance to the destination is more than 120 miles round trip
- the destination is not on a public transport route
- you are transporting large or bulky materials

A small or medium car will be provided, class A, B or C. If you require a car outwith these classes, you must provide justification at the time of request. Please follow the car hire company's instructions for refuelling the vehicle. The cost of the fuel can be claimed back through expenses.

## Overnight accommodation

All overnight accommodation must be booked by us. We have a procurement arrangement in place which is designed to achieve cost efficiencies through negotiated Scottish Government rates. Rates are detailed below for your information.

Overnight Accommodation (B&B)	£95
Overnight Accommodation (B&B)- <i>During main diet (April and May)</i>	£120
Overnight Accommodation (B&B)- <i>During main diet (June and July)</i>	£150

Please note it may not be possible to book all appointees attending meetings into the same accommodation.

Accommodation is booked with a £20 allowance for evening meal included. Where evening meal is not taken in the hotel, this allowance may be used to eat elsewhere.

Claims for costs of accommodation not booked by us will not be reimbursed.

#### **One day event accommodation requests**

Overnight accommodation will only be permitted the night prior to an event if your journey would exceed two hours in each direction.

#### **Multiple day events accommodation requests for consecutive nights**

If you are to attend an event lasting more than one day, please provide as much detail as possible when requesting overnight accommodation. Each request will be assessed on a case-by-case basis.

#### **Special requirements**

If special arrangements are required for your travel, overnight stays and/or dietary requirements, please provide detailed information on your Travel and Accommodation Request (TARE) form. Alternatively, please speak with your contact.

### **What you should book**

Rail, bus and ferry tickets with a value of less than £50.00 (return) must be purchased locally and claimed back using the expenses claim form. Please use reduced rate travel where available.

#### **Taxis**

Taxis should only be used if there is no suitable public or private transport available.

Where a taxi is required, eg to reach a remote venue or when carrying heavy goods, prior authorisation should be obtained.

In exceptional circumstances only, eg travel delays, adverse weather conditions or to ensure personal safety, taxis may be used without prior authorisation. In the unlikely event that any of these situations arise, there is an expectation that the cost of the taxi will not exceed £50 (each way). You should provide details by e-mail as soon as possible after the expense is incurred, to support your claim.

An explanation, including authoriser's name, where applicable, should be recorded in the notes of your expenses claim form when a taxi is used.

#### **Airport car parking**

If you need to park at the airport, you should pre-book the long-stay car park as this can result in significant savings.

## **Travel to our Lowden office**

A shuttle pick-up service operates between Waverley station and Lowden. Pick-up times are 08:45 and 09:30 Monday to Friday. Please call Lowden reception on 0345 213 6885 to book a seat or cancel a reservation. All bookings must be made by 15:00 hours on the day before pick-up.

Transport from Lowden to Waverley station leaves daily at 15:00, 16:00 and 17:00 hours, subject to demand, and must be pre-booked at least one hour prior to departure. Transport can also be provided, subject to demand, at 18:00 and 20:00 hours, and must be pre-booked with the receptionist at Lowden before 16:30 hours.

### **Taking the train to our Lowden office**

You can now travel to Lowden via Shawfair station. Further information on this service can be found at <https://www.sqa.org.uk/sqa/94217.html>.

## **How to make a travel and accommodation booking request**

Requests for travel and accommodation to be booked by us must be made using a TARE form, which is available on our website at <https://www.sqa.org.uk/sqa/34559.2295.html>

Please refer to the instructions at the bottom of the form on how to submit your request.

### **Booking timescales**

All TARE requests should be submitted at least 21 working days prior to the event date.

## **5 Expenses**

This section contains important information regarding claiming expenses and the rates you can claim as an appointee.

We will reimburse you for all reasonable and necessary expenses incurred while travelling on authorised activities in accordance with this policy.

Any claims received that do not conform to this policy will be amended.

### **How to claim**

You will be provided with the appropriate forms to allow you to claim expenses. You should submit all claims for expenses within four weeks of incurring the expense. Claims received after the end of the tax year, for work conducted during the previous tax year, may not be reimbursed if they are received outwith the four week period.

We will pay expenses directly into your bank or building society account by

means of Bank Automated Clearing Services (BACS). Claims completed, authorised and approved by the 15<sup>th</sup> of the month will be guaranteed payment on the 15<sup>th</sup> of the following month.

## Receipts

With the exception of mileage claims, you must provide itemised receipts to support all claims. It is your responsibility to ensure that all expenditure has been actually incurred and supported with itemised receipts (not credit card slips). If you use cash, a card less transaction or Apple Pay, please request a receipt.

## Mileage rates

You may only use your own private car to attend our meetings/events/visits when public transport is not available, is unreliable, or is significantly more expensive.

The following mileage allowance rates apply:

- **Private motor car** (regardless of engine size): 37p per mile
- **Private motorcycle** (regardless of engine capacity): 16p per mile

An additional rate per passenger of 2p per mile can be claimed.

We will normally calculate the mileage allowance for attendance at meetings using the shortest distance between the place of departure and the place of the meeting or event.

Mileage claims of a distance greater than that from the address registered with us will not be paid unless approval is obtained in advance.

When you are travelling by car or carrying passengers on business for us, you do so entirely at your own risk and are advised to check that your own car insurance covers such travel. We will not accept any claims in respect of any liability arising directly or indirectly from such use.

## Travel time

In line with our Travel and Expenses Policy and our commitment to sustainability, wherever possible we will organise appointee activities to incur the least amount of travel as possible.

However, some appointees who are required to travel to centres to undertake approval, assessment, verification and/or ad hoc support activities, may be required to travel outwith normal working hours due to travel restrictions or the distance between their home and the location of the centre they are visiting. These appointees will be able to claim travel time under the following circumstances:

Type of activity	Allowance
Exceptional transport arrangements that require	£26.46 per hour up

travel to take place in advance or beyond the date of the activity, eg restricted rail/ferry/flight schedules or where travel from the Highlands/Islands may be required on a Sunday for attendance at a visit/event on a Monday.	to a maximum of 6 hours per day
Travel time and visit/event time extends beyond 11 hours in any one day.	Additional payment of £31.50 per day

Please note:

- travel time cannot be claimed for marking and invigilating duties.
- where normal travel time is extended due to public transport, flight/ferry delays or traffic congestion, this should be recorded when submitting claims and will be assessed on an individual basis.
- travel time to and from events at our offices or external meeting venues, including marking events, will not be reimbursed.
- travel time cannot be claimed if travelling in employer's time.

## Subsistence

Subsistence claims may be claimed only where catering was not provided and/or special dietary requirements were not met at an event/activity.

<b>Duration away from home per day (travel and Qualifications Scotland activity combined)</b>	<b>UK Allowance</b>
6 - 12 hours	Up to £10.00 (+£4 London/Airport)
12+ hours	Up to £15.00 (+£4 London/Airport)
Overnight stay	Up to £20.00 additional evening meal allowance

If you have been requested to undertake duties internationally, please check the [Expenses rates for travelling outside the UK - GOV.UK](http://gov.uk) site for the appropriate subsistence rates applicable in that country.

## Incidental expenses

Expenses for the following will be reimbursed:

- Postage and telephone calls where necessarily incurred.
- Car parking costs for events/visits, where free parking at the venue/centre was not available.

- Bridge toll costs.

Expenses other than these will be reimbursed only where written authorisation is obtained in advance from us. A copy of this authorisation should be submitted with your claim.

Some examples of incidental expenses that will not be reimbursed are detailed below:

- alcohol
- newspapers
- childminding costs
- kennel or cattery costs
- Wi-Fi
- tips
- car washing and valeting
- parking fines/toll road violations or low emission zone charges

## 6 Compliance

We reserve the right to place limits on or refuse the reimbursement of any expenses where we consider them to be unreasonable or not in line with this policy

All personal data provided by appointees in regard to this policy will be maintained and processed in line with their contractual agreement with us.

## 7 Key Contacts

Appointee Management 0345 213 6825 [am@qualifications.gov.scot](mailto:am@qualifications.gov.scot)

Events Planning [assessment.planning@qualifications.gov.scot](mailto:assessment.planning@qualifications.gov.scot)

Events Delivery 0345 213 6933 [events.expenses@qualifications.gov.scot](mailto:events.expenses@qualifications.gov.scot)

Lowden reception 0345 213 6885

Optima reception 0345 279 5021