

Morecambe Bay



Primary Care Collaborative

Expenses Policy

Document Reference	POL028
Purpose	The purpose of this policy is to state the key principles relating to the Federations approach to expenses f
Author	Pam Compston
Application/Scope	Organisation-wide
Approval Date	01/04/2023
Review Date (N.B: Review dates may alter if any significant changes are made)	01/04/2026
Version	V1.0
Status	Approved



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1. INTRODUCTION

1.1 Summary/Background

The Morecambe Bay Primary Care Collaborative (MBPCC) is committed to ensuring that all expenses incurred in the course of conducting business are reasonable, appropriate and compliant with relevant laws and regulations. This policy sets out the guidelines for claiming expenses and outlines the expectations for all staff and volunteers in relation to expenses incurred in connection with MBPCC activities.

1.2 Eligibility

This policy applies to all staff, volunteers and board members of MBPCC who are required to incur expenses in the course of their work for the organisation.

1.3 Expenses types

The following types of expenses may be claimed, subject to prior approval from the relevant manager and subject to the conditions set out below:

1. Travel expenses: This includes expenses incurred for travel by public transport, taxi or private vehicle, as well as accommodation and subsistence expenses.
2. Subsistence expenses: This includes meals, refreshments and other related expenses incurred whilst away on business trips.
3. Equipment and supplies: This includes expenses incurred for the purchase of equipment and supplies required for MBPCC activities.
4. Other expenses: This includes expenses that are not covered by the above categories but are deemed necessary and reasonable for the conduct of MBPCC activities.
5. Mileage will be reimbursed at the current HMRC approved rate.
6. In case of an approved overnight stay, hotel expenses will be reimbursed up to a maximum of £150 per night.
7. Reimbursement for meals during a pre-approved overnight stay will be limited to £25 per day.

2. PROCEDURE

2.1 Expenses Claims Procedure

Expense claims must be submitted to the relevant manager within a reasonable time frame, and must include all relevant receipts and supporting documentation. Claims must be made using the MBPCC Expense Claim Form, which is available from the finance department.

2.2 Reimbursement

Reimbursement for approved expenses will be made in accordance with MBPCC's payment schedule. All expenses must be reasonable and must have been incurred in accordance with this policy.

2.3 Prohibitions

Prohibitions:

The following expenses are not eligible for reimbursement:



- Personal expenses that are not directly related to MBPCC activities.
- Expenses incurred as a result of the individual's own negligence or wilful misconduct, such as fines or penalties.
- Expenses that are in violation of any laws or regulations.
- Expenses that are not supported by adequate documentation or receipts.
- Expenses that are deemed unreasonable or excessive.

2.4 Approval

All expenses over £100 must be approved by the relevant manager prior to incurring the expense. In the absence of prior approval, reimbursement may not be possible.

2.5 Review

This policy will be reviewed on an annual basis and updated as necessary to ensure that it remains relevant and in line with best practice.

2.6 Conclusion

The MBPCC Expenses Policy is designed to ensure that all expenses incurred in the course of conducting business are reasonable, appropriate and compliant with relevant laws and regulations. All staff, volunteers and board members are expected to comply with this policy and to seek approval for expenses in accordance with the procedures outlined.

3. DEFINITIONS/GLOSSARY OF TERMS

Abbreviation or Term	Definition
MBPCC	Morecambe Bay Primary Care Collaborative

4. CONSULTATION WITH STAFF, PRACTICES AND PATIENTS

Enter the names and job titles of staff and stakeholder that have contributed to the document

Name	Job Title	Date Consulted
Pamela Compston	HR Advisor	

5. DISSEMINATION/TRAINING PLAN

Action by	Action Required	Implementation Date
Andrew Giles	Ensure all employees are aware of the policy and are asked to read and understand it	MBPCC Board Meeting
Liz Stedman	Upload to TeamNet	Following approval

6. AMENDMENT HISTORY

Version No.	Date of Issue	Section/Page changed	Description of change	Review Date
V1.0	14/04/2023	Approved Policy	New Policy	01/04/2026



V1.0	tbc	N/A	Approval by MBPCC Board	
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