

Human Resources

Reimbursement of Travel and Personal Expenses Teaching Service



REIMBURSEMENT OF TRAVEL AND PERSONAL EXPENSES TEACHING SERVICE

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OVERVIEW

An employee may be eligible for reimbursement of reasonable out of pocket expenses actually and necessarily incurred in the course of his or her authorised duties in the following circumstances:

- expenses associated with an overnight absence from home or part day duties away from the normal work location
- work-related travel expenses such as use of a private motor vehicle
- travel and removal expenses on relocation
- expenses incurred in using private vehicles
- expenses incurred to travel to attend an interview
- other out of pocket expenses considered necessary and reasonable such as private phone usage.

Reimbursement of expenses is subject to the requirements of Part 7 of [Order 199](#).

Information regarding the rates and the procedures for the reimbursement of expenses is available on HRWeb at [Travel and Personal Expenses Teaching Service](#).

PERSONAL EXPENSES

Employees whose duties require them to be absent from their normal work location (or headquarters where the employee works in a number of locations) overnight or who has approval to undertake work-related travel, will be reimbursed reasonable out of pocket expenses for meals, accommodation and incidentals. Employees who are absent from their normal work location and the absence does not extend overnight may be reimbursed in respect of the cost of meals and other reasonable out of pocket expenses.

Reimbursement for meals, accommodation and incidental expenses are subject to the following conditions:

- reimbursement is in addition to the cost of conveyance except where the cost of conveyance includes the cost of meals or sleeping accommodation or both.
- an employee must normally have travelled in excess of 24 km radius from their normal work location to be eligible to make a claim for personal expenses.

In circumstances where an employee with dependants is transferred or promoted to a position but unable to secure a residence suitable for themselves and their dependants and as a consequence is required to:

- live away from home and pay board and lodging; or
- pay board and lodging for themselves and their dependants; or
- incur additional expenditure;

the employee may be reimbursed such allowance as the delegate considers reasonable provided it does not result in a payment that exceeds the relevant amounts set by the Australian Taxation Office (ATO) as adjusted from time to time.

TRAVEL EXPENSES

An employee who is required to travel from their normal work location (or headquarters where the employee works in a number of locations) in the course of their authorised duty will be reimbursed for work-related travel expenses. Conveyance should be by public transport, unless it is deemed impracticable or it is considered expeditious or more economical for an employee to travel by an alternative form of transport as outlined in the Department's Travel Policy-Overseas and Domestic Travel.

All work-related travel must comply with the Department's Travel Policy-Overseas and Domestic Travel (for further information see: [Travel and Personal Expenses Teaching Service](#)).

MILEAGE ALLOWANCE

An employee who:

- is required to travel in the course of their duty; or
- travels to a new location as part of relocating his or her residence and is eligible for relocation expenses (see below)

may be authorised to use his or her private vehicle where travel by public transport is not practicable or it is considered expeditious or more economical for an employee to travel by motor vehicle. The employee's motor vehicle must be registered, have full comprehensive insurance, which includes liability at law for damages and an endorsed indemnity to the employer and the driver must hold a current driver's licence.

An employee is required to obtain prior approval to use their private vehicle by completing an Application to use a Private Vehicle on Official Duty form which is available on HRWeb at [Travel and Personal Expenses Teaching Service](#).

An employee who is authorised to use their private vehicle is eligible to be paid an allowance to cover the cost of using the vehicle by the most direct route. The allowance is calculated based on the distance travelled from the base location to the destination. The normal cost of travelling to and from home to base (that is, the normal work location on the date of travel) cannot be claimed. Where the employee commences travel from home to the destination and/or completes the travel from the destination to home, only the excess distance between home and base can be claimed if the normal mode of travel is by motor vehicle.

As soon as practicable after the travel, the employee is required to submit a written claim that sets out the date, the purpose of the trip, the number of kilometres travelled and the type of vehicle used. It is expected that mileage claims will be submitted in the same financial year in which the travel occurred. The Travel Expenses claim form which should be used for making a claim is available on HRWeb at [Travel and Personal Expenses Teaching Service](#).

The rate(s) payable to employees is that set by the ATO as adjusted from time to time. Claims will be paid at the mileage rate applicable on the date of travel. It is an ATO requirement that where an employee is paid an allowance for the use of a private motor vehicle (other than for transport or removal to a new location), it is to be included on the

employee's PAYG Payment Summary. As a result, claims for use of a private motor vehicle must be processed on the payroll.

RELOCATION EXPENSES

For the purpose of this section:

eligible employee is defined as an ongoing employee who is required to relocate his or her residence owing to:

- promotion to an advertised vacancy;
- transfer following an official instruction;
- transfer to an advertised vacancy after having served for at least five years immediately prior to that transfer in the one school or location or at least four years in a school designated as Remote;
- redeployment as an excess employee.

dependant is defined as a person maintained by and permanently domiciled with an eligible employee, including a spouse, a child under 16 years of age, a full-time student child and a parent.

Where the time or distance to be travelled requires a relocation of residence, an eligible employee may be reimbursed the necessary and reasonable expenses incurred for travel, meals, accommodation and the cost of removing household furniture and personal belongings by the most direct route in respect of the employee and his or her dependants. The cost of removing household furniture and personal belongings includes the cost of comprehensive insurance cover for those items whilst in transit, up to a maximum cover of \$45,000.

Where an eligible employee uses their private motor vehicle for transport to the new location he or she will be reimbursed at the appropriate rate set by the ATO, as adjusted from time to time.

Where more than one employee is eligible to be reimbursed removal expenses in respect of the same relocation, only one of the employees will be eligible to be reimbursed removal expenses.

Reimbursement of travel and removal expenses is not available in the case of:

- a transfer arising from the request, fault, or misconduct of the employee; or
- relocation from place to place within Ballarat, Bendigo, Geelong or within the Melbourne metropolitan area.

An employee is required to obtain approval for payment of relocation expenses prior to making any arrangements to relocate by completing an Application for Payment of Relocation Expenses which is available on HRWeb at [Travel and Personal Expenses Teaching Service](#).

Re-establishment allowance

An eligible employee, who is promoted, transferred following an official instruction or redeployed and who is eligible for reimbursement of removal expenses, is entitled to receive a re-establishment allowance of \$850 where the employee has dependants or \$400 where the employee has no dependants.

Where more than one employee is eligible to be paid a re-establishment allowance in respect of the same relocation, the maximum allowance paid for that relocation will be \$850.

Reimbursement of stamp duty

An eligible employee who is promoted, transferred following an official instruction or redeployed and who is eligible to be paid a re-establishment allowance may be reimbursed the reasonable cost of stamp duty paid on purchase of a residence, or land for the purpose of building a residence, for his or her own permanent occupation at the new location. To be eligible for the reimbursement of stamp duty the employee is required to demonstrate that he or she has:

- sold a residence at his or her old location;
- entered into occupation of a residence at the new location within 15 months of the effective date of the promotion, transfer or redeployment; and
- provided satisfactory evidence of expenditure.

Reimbursement of stamp duty is not available where the employee occupies a Government residence at the new location.

REIMBURSEMENT OF EXPENSES

Employees will be reimbursed allowable expenses that were actually incurred in the course of their approved official travel provided those expenses were reasonable. An expense will be considered reasonable where it does not exceed the relevant amounts set by the ATO as adjusted from time to time.

Reimbursement will be for actual expenditure, and will not exceed the relevant ATO rates, unless otherwise approved by the delegate. Reimbursement for expenses is subject to the provision of evidence of expenditure.

To claim reimbursement, an employee must submit official receipts substantiating allowable expenses incurred. Where the delegate is satisfied it is not reasonably practicable to obtain a receipt, other satisfactory evidence of expenditure may be accepted. Official receipts or other satisfactory evidence of expenditure must be provided as soon as practicable upon return from travel. Information regarding the rates and procedures for the reimbursement of expenses is available on HRWeb at [Travel and Personal Expenses Teaching Service](#).

Upon request an employee may be provided with an advance for the expected costs associated with work-related travel (Note: A per diem allowance is not payable to an employee). As soon as practicable after the event, the employee will provide the delegate with an account of all expenses incurred together with receipts (and where necessary a statement) and any balance owed to the Department.

EXPENSES TO ATTEND INTERVIEW

Where a teacher or paraprofessional is required to travel in order to attend an interview for an advertised position in a Victorian government school, reasonable and necessary expenses will be reimbursed. The principal of the school with the advertised vacancy should discuss with the teacher or paraprofessional any expenses that may be incurred prior to the teacher or paraprofessional attending the interview. Principals should ensure that teachers

or paraprofessionals do not undertake unnecessary travel by fully exploring teleconferencing facilities.

The cost of any travel and incidental expenses for eligible teachers will be met from the Student Resource Package of the school that has advertised the vacancy.

An excess employee who is required to travel in order to attend an interview as part of the redeployment process will have reasonable and necessary expenses reimbursed.

OTHER EXPENSES

Where an employee incurs expenses in excess of the amounts set out above or an expense in circumstances other than set out above, the [delegate](#) may authorise reimbursement of such expenses as are considered reasonable.

FURTHER ASSISTANCE

For advice or assistance on any matters related to reimbursement of expenses contact Schools People Services on 1800 641 943.