

External Examiner Travel and Expenses Guidelines

1. General Rules

1.1 Introduction

As a general rule external examiners will be reimbursed for all reasonable expenses that they incur wholly, exclusively and necessarily in the course of external examination business.

The University is a recipient of public funding and, as such, should apply appropriate standards of economy. In the current financial climate Queen's is required to take all reasonable steps to reduce expenditure.

The University must ensure that payments comply with HM Revenue & Customs guidance and legal obligations. It is therefore essential that the rules detailed in this guide are followed when making an expenses claim. This will enable the University to make the reimbursement of expenses without deduction of tax.

1.2 Authorisation Procedures

Expense claims will not be paid until a satisfactory External Examiner Report has been received. The Head of School/Director or relevant authorised signatory should ensure that all expenditure on University business is justified and that all claims are in accordance with University's travel and expense policy and purchasing regulations.

Claims for reimbursement should be made as soon as possible after the event giving rise to the claim and **no later than six weeks** following the date of the expenditure. If claims are received by the first working day of the month the payment will usually be paid before the end of that next month. Payment of expenses will be authorized on receipt of a completed claim form accompanied by evidence of costs incurred. Payment of fees will not be authorized until the external examiner's annual report has been received.

1.3 Receipts

Original receipts or invoices and supporting information must be provided for all claims. If receipts are not provided, Queen's will be unable to reimburse the cost.

It should be noted that credit card vouchers or statements are not an acceptable form of proof of purchase.

2. Travel Policy and Expenses

2.1 Introduction

As a general rule, external examiners will be reimbursed for all reasonable expenses that they incur wholly, exclusively and necessarily in the course of the University's business.

The purpose of the External Examiners' Travel Policy & Expenses Procedures is to:

- Define the Queen's policy and procedures relating to external examiner travel expenditure
- Provide guidance on the types of expenditure that can and cannot be reimbursed by Queen's
- Inform external examiners, and those approving expenses, of their responsibilities when controlling and reporting travel related expenditure
- Relieve external examiners of the need to declare travel expenses in their income tax returns

2.2 Travel Arrangements

2.2.1 Wherever possible, and subject to business needs, travel arrangements should be made in good time to take advantage of cheaper fares or accommodation.

2.2.2 The mode of travel should be the most cost-effective method consistent with the business needs of the University. For example, a flight might be cheaper than rail travel; rail travel might be cheaper than car mileage payments or taxis.

2.2.3 Any changes of travel must be approved by the School prior to booking as Student Services and Systems will not reimburse unless there are extenuating circumstances and cannot be claimed elsewhere.

2.2.4 External examiners should travel and be accommodated in safety and reasonable comfort.

2.2.5 The Head of School/Director in conjunction with Student Services & Systems should ensure that all travel on external examiner business is justified and that all claims relating to that travel are in accordance with the external examiner Travel Policy & Expenses Procedures.

2.2.6 The University has appointed travel agents to fulfill its business travel, accommodation and other associated requirements. You may contact your School if you wish them to contact the appointed agents for your travel arrangements.

2.2.7 Claims for reimbursement must be made no later than six weeks after the expenditure has been incurred and should conform to the regulations in this guide. Claims received by the last working day of the month will be paid before the end of the next month.

2.2.8 External examiners should not be influenced by any promotional incentives such as airline mileage credits or personal cash credit card discounts or rebates. In cases where incentive schemes are offered, for example by airlines, employees should not benefit personally from these incentives but should use them to offset the cost of current or future business journeys. External examiners using air mile credits for private travel would be an unacceptable personal benefit from expenditure of public funds.

2.2.9 Spouses shall not travel at Queen's expense except when their presence is required and authorised for a bona fide business purpose. In all cases, the Head of School/Director or relevant line manager must give authorisation in advance. Retrospective authorisation will not be accepted.

2.2.10 A spouse may accompany an external examiner for personal reasons. In such instances, Queen's must not be charged for more than if the member of external examiners had travelled alone. Wherever possible, the spouse's travel costs should be invoiced separately and paid privately. If the invoice includes both private and official travel costs, the external examiner should settle the total invoice and reclaim the official element from Queen's. Separate private insurance must be taken out to cover the spouse's travel.

2.2.11 The external examiner shall not claim any additional travel costs, subsistence or other expenses for days taken as a holiday linked to the trip.

2.2.12 Queries on making travel arrangements should be directed to External Examiners within Student Records and Examinations on ext 3927 or extexamexpenses@qub.ac.uk.

2.2.13 External examiners travelling from overseas are advised to have passports valid for at least 6 months after their return. The International Office, ext.3899, will provide advice on the need for visas.

2.2.14 In all cases the external examiner may be expected to meet costs in the first instance and submit a claim later, in which case an official Queen's Claim Form must be used.

2.3 Air Travel

External examiners must choose the most economical fare available to them at the time of booking; 'economical' being defined as the lowest-priced fare that meets requirements. In most cases, this will mean economy class, particularly for domestic travel within the UK and on shorter journeys within Europe.

The following should also be taken into consideration when sourcing the most cost-effective fare:

- Book as far in advance of the travel as possible to take advantage of discount fares
- Avoid last minute changes before or during a trip where these result in higher fares
- The use of codeshare arrangements with airline alliances offering competitive connecting fares

Non-refundable fares should be accepted when travel plans are relatively certain; however, the discounts should be weighed against the penalties when making this decision.

Your School may agree to arrange travel bookings through the Queen's appointed travel agents. Alternatively, it is permissible to book through the following sources:

- 'No frills' airlines such as Easyjet, FlyBe and BMI Baby
- Internet Booking Agencies such as Expedia

Business/First Class Travel

Queen's recognises that there may be a need for external examiners to travel in business or first class. In such cases, prior approval must be obtained from the Head of School/Director to ensure that sufficient funds can be made available. Otherwise, the external examiner must pay the difference between standard class and the air fare charged from his/her own funds.

Please note that Student Services & Systems will only reimburse flight expenses up to a total of £250. Any expenses above this threshold will be passed to the relevant School for reimbursement. Examiners should check with the School to ensure it is willing to cover additional costs.

2.4 Car Mileage

Claims for car usage will be met at the discretion of the School concerned and normally will be permitted only where public transport is unavailable or impractical, or where the mileage claim is cheaper than the cost of making the journey by public transport.

Mileage in these circumstances will be paid at the rate of 40p per mile for the first 100 miles, and 25p per mile thereafter.

Details of all journeys including the date, starting point and destination for each should be shown on the expenses claim form.

2.5 Car Insurance - Private Vehicles

As Queen's does not provide car insurance cover for external examiners using their own vehicles, external examiners are required to confirm that they have taken out personal motor insurance with an appropriate extension to cover use in connection with external examining business. The mileage rates payable by Queen's includes an element to defray the cost of insurance as well as vehicle depreciation, fuel etc.

2.6 Car Parking

Queen's will reimburse all expenses for car parking costs incurred whilst travelling on external examining business. Claims must be supported by receipts.

Claims for parking excess charges, fines on all motoring related offences, wheel clamping, etc. will not be reimbursed under any circumstances.

2.7 Public Transport

Where external examiners use public transport they will be reimbursed on a receipts basis provided the expenses are reasonable.

2.8 Rail Travel

In general, all external examiners should ensure that the most economical class of travel is used. In practice, this will usually be standard class.

If an external examiner wishes to travel in first class, they may pay the difference in cost to do so. Alternatively, prior approval must be obtained from the Head of School/Director.

2.9 Taxis

Claims for taxis will be met at the discretion of the School concerned and normally will be permitted only where public transport is unavailable or impractical.

3. Subsistence Allowance

External examiners may claim either the actual, reasonable cost of food and drink supported by receipts. The rates listed below represent the **maximum** permissible costs that will be reimbursed:

£15 for lunch, or,
£25 for dinner.

Any expenditure in excess of this should be approved in advance by the Head of School/Director. Appropriate receipts must be included. Student Services and Systems will only reimburse costs for external examiners.

4. Accommodation

Hotel accommodation should be arranged by your School, and the costs will be paid directly by the School and reimbursed from Student Services & Systems.

Basic standards for accommodation include cleanliness, privacy security and the availability of breakfast. Fully receipted accommodation on a bed and breakfast basis is expected to cost around £80 and be rated as 'four stars'. Only claims up to the value of £100 will be paid.

Queen's has the right to reject all or part of any amount in excess of the guide rate if they are not satisfied with the justification and all claims must be fully receipted.

The University will only bear the cost of accommodation required for business purposes and will not meet the costs of any extensions to a stay for personal reasons or for accommodation provided to a spouse or other family members.

Recommended accommodation is listed below. Hotels marked in bold are in the closest proximity to Queen's. The hotels may offer preferential rates if Queen's University is quoted as your ID reference to the reservations department.

LOCATION	CONTACT DETAILS (Reservations Dept.)
Europa Hotel	028 9027 1066
Hilton Hotel	0870 86 36 169
Jurys Hotel	028 9053 3500
Malone Lodge Hotel	028 9038 8000
Radisson SAS Hotel	028 9043 4065
Ramada Hotel	028 9092 3500
Templeton Hotel	028 9443 2984
Wellington Park Hotel	028 9038 1111

4.1 Personal Items

External examiners should note that items of a personal nature, such as alcoholic drinks, mini-bars, movie hire etc. will not be reimbursed by Queen's and these should be deducted from any bills submitted for reimbursement.

4.2 ISDN/Broadband

It is university policy not to reimburse external examiners for ISDN/broadband services or related equipment. These services should be made available on-campus if requested.

4.3 "Staying with Friends" Allowance

Where external examiners choose not to stay in a hotel or guest house and instead stay with friends or relatives, an allowance of £25 per night may be claimed as a contribution towards the costs incurred by friends or relatives in providing the accommodation. This allowance is instead of any hotel costs for bed and breakfast which might normally be claimed.

5. Travel Insurance

External examiners are not insured under the Queens Travel Insurance Policy. Costs for travel insurance will be re-reimbursed for external examiners travelling from outside the UK or Ireland.

6. Enquiries

Any enquiries relating to these rules should be addressed in the first instance to Head of School/Director who may then refer the matter for further clarification to Student Services & Systems ext 2727 or External Examiners ext 3927.

Queries in relation to travel arrangements should be referred to the Head of School/Director or External Examiners ext 3927.