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Introduction

This document contains information about the expenses payable to those undertaking assessment services for OCR.

Queries

Queries regarding expenses should be emailed to AS.Payments@cambridge.org.

Queries regarding remittance advice notes should be emailed to ASPayroll@cambridge.org.

Submitting claims

Claims should be submitted via email only

When submitting a claim, attach your completed claim form and images of receipts to the email. Where relevant, you should also include any additional information, such as special requirements or mobility issues, that would assist in processing your claim.

Payment process for expenses and fees

Fees received by the end of one month will be paid in the following month's payrun.

UK based assessment specialists - Expenses are paid weekly, within 15 working days of receipt by Finance. A payment notification will be sent at the time of payment via email. Fees are paid monthly to credit on the 28th of each month (or previous working day). Payment notifications are emailed mid-month detailing the gross value and what your payment is for. In addition to that, payslips are available to view on the Assessment Specialist Portal: https://asportal.cambridge.org/irj/portal

Non-UK based assessment specialists - All non-UK resident assessment specialists will be paid fees and expenses once per month. Payments will be sent mid-month and you should receive the payment shortly after you receive your emailed remittance advice.

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Allowable expenses

HM Revenue and Customs and Self-assessment

You are not required to include travel and subsistence expenses on any self-assessment forms, or for OCR to deduct income tax from these payments, as long as the criteria set out in this guide are met.

- All claims should be submitted via email only.
- For all actual expenses incurred you must provide a brief description of each item on the claim form and attach images of original receipts.
- Receipts are required for all expenses that require reimbursement, including accommodation, public transport, taxis, phone calls and any subsistence. We are unable to reimburse any items without receipts. If you would like to discuss cases where you were unable to gain a receipt, please contact AS.Payments@cambridge.org to discuss the options before sending in your claim.
- OCR will not reimburse the cost of personal items.
- Expense claims should be submitted on a regular basis.

Travelling

You must travel by the most direct route to and from your destination.

OCR will not pay travelling expenses for passengers.

For assessment specialist travelling to required meetings from abroad, OCR will pay travel expenses from the point of entry* to the UK to the meeting venue, (*from an airport or port of entry). In exceptional circumstances a request for reimbursement of expenses for travel to and from a destination outside the UK will be considered on a case-by-case basis, taking into account the comparative costs of journeys of similar distances made within the UK.

Public Transport

You must use the most economical and appropriate means of transport. This should be booked in advance.

OCR will reimburse any reasonable standard class public transport fare which is required to be used as part of your journey. If you use an Oyster card, provide your account printout when claiming.

Car/motorcycle mileage

You must ensure that your vehicle insurance policy covers business use. Mileage is paid as below:

Car - 55 pence per mile for the first 10,000 business miles in the tax year, 25 pence per mile thereafter.

Motorcycle - 24 pence per mile.

Charges - OCR will reimburse car parking and toll charges. If you use a Toll Tag, provide your account printout when claiming.

If you are visiting centres in Central London and using your own vehicle you will need to register for the congestion charge. You can claim this cost from OCR.

OCR will not reimburse fines for driving or parking offences.

Accommodation

OCR will normally pay for overnight accommodation only if you would otherwise need to leave home before 6:30 am or arrive back after 11:00 pm.

The accommodation must be booked through the Tobook agency (see page 6 for guidance).

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Subsistence

OCR will reimburse expenses up to the maximum values shown below. Any claims above these values or without receipts will be reduced

The following rates are effective until 31 December 2026.

- £7.20 Breakfast (if you leave home before 6.30am).
- £8.80 Lunch (if not provided at the venue).
- £25.00 Dinner (if you arrive home after 7.30pm).
  Accommodation should be booked using Tobook. Where accommodation is booked by the AS directly the maximum values are shown below. Any claims above these values or without itemised hotel receipts will be reduced.
- £120.00 Bed and Breakfast (if you leave home before 6.30am or arrive home after 11.00pm)
- £25.00 Staying with relatives/friends (a completed 'Accommodation costs charged for staying with friends or family' expense claim form is required which also forms a receipt, that must be completed by both the host and the assessment specialist. Claims will be reduced if this is not attached.

Claims for alcoholic drinks, texts, or IT hardware or software will not be accepted.

Additional payment for exceptional travel to centres

Centre visits are allocated using a number of criteria, including the geographical location of the centre and the moderator. Wherever possible, we aim to allocate centres as close as possible to the moderator.

However, if the visit requires you to drive 200 miles or more in a day, then the following extra payment will be made on top of your mileage.

No. of Miles	Base Rate	Hol Pay	Total
200-250	19.4	2.34	21.74
251-300	38.8	4.66	43.46
301-350	58.2	7.02	65.22
351-400	77.6	9.36	86.96
401+	97	11.7	108.7

To receive this, add your total mileage to your expenses claim form. Our finance team will process all necessary payments and you will be notified when the payment is being made via email.

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Postage, telephone, printing and photocopying

All claims should be submitted via email only

Postage
Actual expenses incurred will be reimbursed when supported by an original receipt.

Telephone
HMRC will only allow us to reimburse the cost of calls you make as part of your assessment task for OCR which are identified on an itemised bill. There are no other circumstances in which call charges can be reimbursed.

If you use your mobile phone for OCR-related calls please be aware that we are not permitted by HMRC rules to reimburse you for calls made using 'free' minutes as part of a package, or the cost of Pay As You Go top-ups.

So that you can provide an itemised bill when claiming for phone calls made on OCR's behalf, you may want to call from home using a landline. If you are staying in an hotel on OCR business, if you are unable to supply an itemised bill for your mobile phone, you may wish to use the hotel landline to make assessment-related calls and ask for an itemised bill.

Please ensure a phone call is absolutely necessary. It may be beneficial to get the person you are calling to call you back, or consider using email as an alternative, where appropriate.

You can submit claims for postage and telephone expenses using the EC11 forms.

Printing and photocopying

This is regarded as a taxable allowance by HMRC For essential printing and photocopying, you can claim reimbursement of costs at 7 pence per sheet. Please save your printing costs until they reach a minimum of £7.00. You can submit claims using the new EC11PR form.

Describe each document printed or copied on the claim form and specify the number of sheets printed for each. Only claims which provide this information will be reimbursed.

Please ensure that you only print or copy documents you need to use in hard copy. OCR documents are increasingly created to be used on screen.

If printing the document is necessary please:

- Set your print setting to 'draft' quality, unless full quality is absolutely necessary.
- Only print out the pages of a document you need.

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Fees & expenses claims

Submit your claims on the EC50 marking or EC51 moderating fees & expenses claim form.

These forms, and the associated user guides, can be found under the *Expenses* tab of the Assessment Specialist Communications website.

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Overnight accommodation booking information

If you have been invited to attend a meeting and need overnight accommodation, follow these instructions to make your reservation.

OCR uses Tobook to assist in the smooth and efficient running of accommodation booking. Following these booking procedures will ensure a trouble-free stay.

Accommodation booking procedures

You should register your accommodation requirements, where possible, at least six weeks prior to your date of stay. Submit your request using the Online Registration Form at www.tobook.co.uk using the following sign-in details:
Username: **OCRAM** Password: **DHMNKG**

Please do not book with the venue directly.

Submitting your request on the Online Registration Form, gives you the freedom to register at a time that suits you. It also allows you to indicate your 1st and 2nd choice hotels, and to note any special requests in the 'Additional Information' box. You **must** enter either the 'unit code', the 'panel ref', the 'scheme code' or the 'budget code' for each subject in the 'unit code' field on the form.

Your booking confirmation will be sent via email within three working days. If you do not receive this within three working days please contact tobook@tobook.co.uk or by telephoning 01676 522868.

To ensure your emails are received in your inbox and not rejected as 'spam', please add bookings@tobook.co.uk to your Address Book and/or Safe List.

If you do not have access to the internet at the time of booking, post your request, which must include your Creditor Number/Assessment Specialist ID Number and either the 'unit code', the 'panel ref', the 'scheme code' or the 'budget code' and your telephone number, to the address below.

Tobook Team
91 Main Road
Meriden
West Midland
CV7 7NL

Please note: Tobook will only take telephone bookings if your stay is within seven working days and you cannot access the internet.

Book promptly

To ensure you get the OCR preferential rate, please book your accommodation via Tobook no later than two weeks before the meeting date. This is to ensure you get the OCR preferential rate.

Amendments and Cancellations to Bookings

You must contact Tobook in writing to amend or cancel an existing booking.

If you don't inform Tobook of any cancellation within at least 48 hours of your stay this will result in you having to pay any cancellation charges.

Independent Bookings

If you book accommodation independently, OCR will only reimburse up to the current maximum Bed and Breakfast rate of £120 and if you need to cancel your booking we are unable to reimburse the cancellation charge.

We would like you to use ToBook if booking any overnight accommodation whilst attending standardisation meetings. In these unprecedented times by using ToBook means we aren't charged if you need to cancel. Please visit www.tobook.co.uk to book any overnight accommodation.

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OCR policy on overnight stays

You are normally expected to travel to the meeting in the morning and return home the same night. OCR may agree to overnight accommodation in circumstances where when attending a meeting, you would have to leave home before 6:30am and return later than 11pm. In cases where you are expected to attend meetings on consecutive days, and a return home would be unreasonable, claims for overnight accommodation will be allowed.

Payment of accounts

You must settle your own account on departure when staying less than three consecutive nights. This is to be claimed back from OCR via an expense claim form. Please remember that unreasonable claims for accommodation will not be authorised by OCR.

For stays of three consecutive nights or more, your account will be invoiced to OCR. Please note that the 'unit code', the 'panel ref', the 'scheme code' or the 'budget code' for each subject is required in order to make this arrangement.

Accommodation and Subsistence Expenses

Actual expenses will be reimbursed up to the maximum figures quoted in the relevant sections of this guide.

Attending meetings at OCR

Access and dietary requirements

If you have any particular dietary requirements (where lunch is provided), mobility or access requirements, for example working with a sign language interpreter or a hearing loop system, please inform us via email when you accept the invitation to the meeting.

Car parking in Cambridge

Car parking spaces are not offered at the Triangle in Cambridge. Public parking is available at Cambridge Leisure Park, Clifton Way, CB1 7DY. Please see Information for visitors document for parking and transport options.

Teacher Release fees

Teacher release fees are only available for schools in England and Wales

The current fees for Teacher Release are:

- £189 full day
- £94.50 half day

For attendance at a meeting, or when delivering training or CPD at a face-to-face event, you can claim either a meeting attendance fee or a Teacher Release fee, but not both for the same meeting or event.

Please click here to download a copy of the Teacher Release claim form.