

## Travel Claim Guidance

***\*\*Disclaimer\*\*** This information is intended for Disability Support Services (DSS) clients only. It does not apply to District Health Board (DHB) clients. If you are seeking support for travel related claims from DHB funding, please contact us directly.*

### Background

DSS and the IF auditing team at HPIT have made it clear that we need to be collecting more evidence for travel related claims from our customers. As we have not had very clear guidance in the past, it is important that our customers and the Manawanui team are all aware of what is required from our customers so that clarity and consistency is expected.

### Purpose

This document will clarify the 'Gold Standard' of evidence to support a travel related expense claim, as well as considerations that may affect evidence requirements for a specific claim.

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## Gold Standard

### Petrol Receipt

If we receive a receipt for purchase of petrol, the description must clearly state what travel the petrol was used for, and how that travel meets the purchasing guidelines for disability related support costs.

*Example Description "Petrol for Support Worker, return trip home to Swimming Lesson(s) @ Parnell Pools (X total km)"*

Ideally the description will contain both the departure point and destination for the travel, or will be accompanied by a travel log to account for the use of petrol. There must be enough detail to show that the travel was local (within region) travel. Local travel means travel within a local community where the disabled person usually lives, works, engages in recreation and otherwise lives their life.

The cost of the petrol claimed must be reasonable according to the total distance (km) travelled.

### Mileage Claims

Mileage Claims require sufficient detail to validate the cost. If a customer is maintaining a logbook for disability support related travel, this is the detail we expect:

- Date of travel
- Departure point and destination locations
- Distance in kilometres
- Purpose for trip
  - (must satisfy criteria for approved disability support related travel)
- Driver name

How to Present this information to Manawanui

- Log book as invoice
  - As long as all details from above are included in screenshot from logbook. You should retain your travel logbooks to support any future audit.
- Write all the details listed above into the claim description, with e.g. an image of the travel mapped to support the total distance claimed.

## Claim Considerations

**Consistency** – If this travel is a regular occurrence and follows a consistent pattern, and/or we have notes from a Manawanui staff member previously approving this as ongoing/regular cost, we may be able to approve with less detail in the description for each individual claim (e.g. “travel for weekly swimming lesson(s) as previously approved”).

**Amount** – If the amount of the travel claim is large in relation to the funding amount, or larger in relation to previous claims, this requires a very comprehensive description and justification

**Travel claims without associated hours of support** – To be approved, travel needs to be associated with a disability support. If the travel claim cannot be associated with hours of support (including respite), this should prompt an enquiry as to the purpose of the travel. In some cases, travel without paid support hours can meet criteria for disability supports, but we are obligated to query if this is not clearly evidenced.

## Notes

*If any of the information contained in this document is not clear, please contact our Customer Experience Centre and we will be happy to discuss with you.*

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