

Duty of Care - Feature Overview

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Overview

Duty of Care is an employer's moral or legal obligation to ensure the safety or well-being of their employees. **Driving** is considered one of the most dangerous activities undertaken by most employees when travelling and entertaining through the course of business. According to the **Corporate Manslaughter and Corporate Homicide Act 2007**, driving any vehicle on company business, regardless of ownership, is subject to legislation and companies must take necessary measures to manage their **duty of care obligations**. They must also take into account key risks relating to the driver, vehicle and journey.

Assure Expenses' intuitive duty of care functionality allows you to manage all your employees' vehicle and driving licence documents, with a full audit history. Removing the burden on managers, claimants upload their own documents; the system then sends an email notification to administrators that documents are ready for approval, streamlining the entire process.

Driver and vehicle documents which are stored against employees are;

- Employee details
- Driving licence
- Vehicle insurance
- Class 1 business insurance
- MOT
- Tax
- Service
- Breakdown cover

Checking an employee has a valid driving licence, along with vehicle insurance – including business use – and ensuring a vehicle is roadworthy and well maintained are crucial tasks. Failure to check licences, or reimbursing expenses payments without adequate licence checks could be interpreted as causing or permitting illegal behaviour.

Recording key details of renewals and limitations within Assure Expenses, through automated email notifications and pre-defined intelligent reports, you are warned well in advance when action is required to stay legal. As an added incentive to prompt renewal, mileage claims can be suspended as part of company policy should any of these documents go out-of-date.

- **Driver Check** - To enhance the Duty of Care service further, Assure Expenses provides you with the ability to look up driver information sourced from the DVLA and automatically populate a claimant's licence details, as well as handling the approval process. For more information, view [Driver Check](#).

- **Vehicle Check** - To enhance the Duty of Care service further, Assure Expenses can automatically populate vehicle documentation (currently MOT and Tax). By looking up the registration number when a vehicle is added to the system, Assure Expenses can automatically populate valid Tax and MOT documents, providing accuracy while further reducing the manual process. For more information, view [Vehicle Check](#).

Benefits

- **Reduce Administrative Burden** - Moving from a manual process outside of Assure Expenses to using the Duty of Care feature will vastly reduce the administrative burden associated with managing duty of care documentation.
- **Improved Workflow** - A designated team or employee's line manager can quickly and easily verify duty of care and driving licence documentation.
- **Secure Repository** - Storing all of this information in a central location provides security and peace of mind.
- **Communication** - System generated emails advise claimants and approvers when Duty of Care documentation is going to expire and what actions need to be taken.

Features

Feature	Manual Process (Outside of Assure Expenses)	Duty of Care	Duty of Care with Vehicle Check	Duty of Care with Driver & Vehicle Check
System Generated Email Reminders	✗	✓	✓	✓
Efficient and Configurable Workflow	✗	✓	✓	✓
Create your Duty of Care Policy	✗	✓	✓	✓
Claim Restrictions based upon Duty of Care Policy	✗	✓	✓	✓
Enhanced Reporting	✗	✓	✓	✓
Full Audit History of Documents	✗	✓	✓	✓
Populate and review non-GB licences	✗	✓	✓	✓
Automatically populate vehicle MOT and Tax documentation	✗	✗	✓	✓

Feature	Manual Process (Outside of Assure Expenses)	Duty of Care	Duty of Care with Vehicle Check	Duty of Care with Driver & Vehicle Check
Automatic MOT and Tax documentation review process	✗	✗	✓	✓
Populate Assure Expenses with Information Sourced from DVLA	✗	✗	✗	✓
Automatic Review Process	✗	✗	✗	✓
Scheduled Updates of Driver Information	✗	✗	✗	✓
Self Service Claimant Consent Portal	✗	✗	✗	✓
Further Email Notification Options	✗	✗	✗	✓
Approver Visibility of DVLA Checks	✗	✗	✗	✓
Prevent Banned/Disqualified Drivers from Claiming Mileage	✗	✗	✗	✓

Implementation/Best Practice

1. Provide staff with links to relevant help documentation and provide training.
2. Amend the Access Role that you currently assign to all of your claimants and add the following **GreenLight Access Role Elements**:
 - **My Vehicle Documents**
 - **My Driving Licences**
 - **My Driving Licence Reviews**

This will ensure that claimants are able to access the Duty of Care menus that they require. For more information, see [Assign an Access Role for Duty of Care](#).

3. Enable Duty of Care in General Options by selecting the documents required by your organisation. For more information, see [General Options - Duty of Care](#).

Note: At least one of these must be selected in order to enable Duty of Care on an Expense Item.

Tailoring

General Options

Field Settings

Code Allocation

Duty of Care

Addresses & Distances

Other Preferences

Automatic Driver & Vehicle Check

There is a cost associated to the frequency of the Automatic Driver & Vehicle Checks. Changing the frequency will affect the amount of credits that you use.

Check claimant driving licences automatically

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Frequency of automatic driving licence checks

Every 1 month

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Number of weeks before consent expiry to send notification

1 Week

?

Approver

Line manager

☒

Team

☐

Documents Required

Driving licence

☒

Tax

☒

MOT

☒

Insurance

☒

Breakdown cover

☒

Enable automatic document lookup

☒

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Email Reminders for Document Expiry

Send reminder to claimant before

7 Days

Days prior to document expiry to send a reminder

Do not send reminder

Review Expiry & Reminder

Driving licence should be reviewed periodically

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Driving licence must be reviewed

Every 1 month

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Send reminder to claimant prior to the review expiry date

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Days prior to review expiry to send a reminder

7 Days

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Claim Options

Use date of expense for duty of care checks

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Note: The 'Enable automatic document lookup' option is part of the Vehicle Check feature and will only be available if 'MOT' and/or 'Tax' are selected in the 'Documents Required' section. For more information, see [Vehicle Check](#).

- Review and enable email notifications/reminders settings. For more information, see [General Options - Duty of Care](#).
- Decide whether you want to implement periodical driving licence reviews where you can determine the frequency that a driving licence review must occur in order for a licence to stay valid.
- Decide upon whether Duty of Care document approvals will be handled by a claimant's line manager or by a designated duty of care team.
 - If **Team** is selected, verify the users in the duty of care team that has been defined for your organisation. If any users are added or removed from the team, you must also add or remove the appropriate access roles. The following **GreenLight Access Role Elements**

should be activated on a Duty of Care approver's Access Role:


- My Team's Vehicle Documents (Awaiting Review/All)
- My Team's Driving Licences (Awaiting Review/All)

7. Enable Duty of Care for each Mileage related Expense Item. **At this point, a claimant must have the relevant duty of care documentation approved within Assure Expenses (based upon the documents required in step 3) in order to claim mileage. It is considered best practice to ensure all other options and duty of care documentation is in place before activating Duty of Care against the Expense Item.**

Duty of Care


Enable duty of care

☐



Class 1 business insurance required

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Once Duty of Care has been activated you may want to consider whether to implement the Driver Check and Vehicle Check features to further automate your Duty of Care processes. For more information on this, view the 'Additional Features' help documentation in the Links section below.

Links

The following walkthrough guides have been created to provide detailed information on how to use the Duty of Care feature:

Additional Features	Driver Check Vehicle Check
Frequently Asked Questions	Duty of Care - Admin FAQs Duty of Care - Claimant FAQs
General Information	General Options - Duty of Care Duty of Care/Driver & Vehicle Check - Process Diagram
Adding Documents/Licence	Add a Driving Licence Add Vehicle Documentation
Approving Documents/Licence	Review a Driving Licence Review Vehicle Documentation
Vehicles	Add a Vehicle Add a Claimant's Vehicle Add a Pool Vehicle Assign a Pool Vehicle User

