

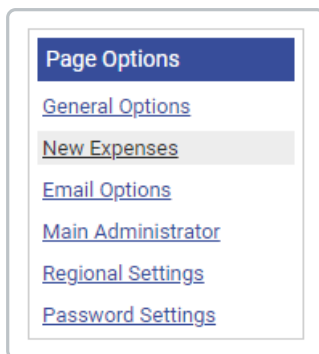
# General Options - Duty of Care

Last Modified on 15/04/2025 2:04 pm BST

## Permissions

You will require an Access Role with the following permissions:

- General Options.
1. Navigate from the **Home** page to **Administrative Settings | Tailoring | General Options**.
  2. Click **New Expenses** from the 'Page Options' menu.



3. Click the 'Duty of Care' tab. This will display the available Duty of Care options available within Assure Expenses. Configure the following options as required:

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

☒

?

Frequency of automatic driving licence checks

Every 1 month

?

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

?

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

?

Claim Options

Use date of expense for duty of care checks

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**Note:** The Driver & Vehicle Check feature is a licenced element and must first be purchased for the 'Automatic DVLA Check' options to display. For more information, please speak to your RLDatix Account Manager.

## Automatic DVLA Checks

Automatic DVLA Checks	
	Enables the Driver & Vehicle Check feature.
Look up claimant driving licences automatically	<p>When enabled, this option will allow automatic checks of driving licence information sourced from the DVLA. This will ensure that information stored in Assure Expenses matches DVLA records.</p> <p>If this option is active and a claimant has not provided consent for checks, the claimant will fail Duty of Care checks and therefore be unable to claim for mileage.</p>

### Automatic DVLA Checks

Frequency of automatic driving licence checks	This is the frequency that the system will look up driving licence records. The default value for this option will be set as 'Just Once'.
Number of weeks before consent expiry to send notification	<p>Select the period to notify a claimant before their DVLA check consent expires. Select from:</p> <ul style="list-style-type: none"><li>• 1 Week</li><li>• 2 Weeks</li><li>• 4 Weeks</li></ul> <p>An email will be sent to the claimant containing instructions on how to renew their DVLA check consent.</p>

### Approver

#### Approver

Line Manager or Team	<p>Define whether the Duty of Care approver is to be the claimant's Line Manager or a Team (a group of related employees).</p> <p><b>Note:</b> Depending on your selection, the My Team's Vehicle Documents (Requiring Review) and My Team's Driving Licences (Requiring Review) menus will display different information.</p> <p>If Line Manager is selected, the @MyHierarchy filter is automatically applied so that the individual can only approve vehicle documents and licences for claimants that they are line manager for. This filter also applies to the following:</p> <ul style="list-style-type: none"><li>• Vehicle field on the vehicle document review form, allowing the approver to only select vehicles for the claimants they manage.</li><li>• Employee field on the driving licence review form, allowing the approver to only select the driving licence for claimants that they manage.</li></ul>
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Approver	
Frequency of automatic driving licence checks	<p>Select a specific team from the Select Team drop-down list to receive the Duty of Care approval requests and reminders.</p> <p>If Team is selected, the filter is removed and the members of the approving team will be able to view vehicle documents and licences for all users. The Duty of Care Reviewer Access Role must also be applied to the team members to allow them to be an approver.</p>

## Documents Required

When selected, individuals are restricted from claiming mileage Expense Items if the documents are missing or out of date.

Documents Required	
Driving Licence	Select the check box to make Driving Licence a required document.
Tax	Select the check box to make Tax a required document.
MOT	Select the check box to make MOT a required document.
Insurance	Select the check box to make Insurance a required document.
Breakdown Cover	Select the check box to make Breakdown Cover a required document.
Enable Automatic Document Lookup (Vehicle Check)	<p>Select the check box to enable to the 'Vehicle Check' feature.</p> <p>This will enable Assure Expenses to automatically populate MOT and Tax documentation when adding a vehicle. The automatic lookup will only apply on Tax or MOT if they have been selected as a required document (shown in the image above).</p> <p><b>Note:</b> If the documents are invalid when the lookup is performed, the MOT and Tax documents will need to be added manually.</p> <p>After the MOT or Tax document expiry date, a new lookup will be performed to retrieve the relevant vehicle document when next attempting to claim using the vehicle. If the vehicle document is still invalid when the lookup is performed, a new vehicle document will need to be recorded manually in order to claim using the vehicle.</p>

## Notifications for Document Expiry

Notifications	
Send reminder to claimant before	A system generated email is sent to a claimant, a number of days before their Duty of Care document(s) expire. Select the number of days from the drop-down list.
Days prior to document expiry to send a reminder	<p>A system generated email is sent to the relevant approvers, a number of days before a claimant's Duty of Care document(s) expire. Select the number of days from the drop-down list.</p> <p>If <b>Team</b> is selected as the approver, all members of the team will receive the email.</p>

## Review Expiry and Notification

Review Expiry and Notification	
Driving licence should be reviewed periodically	Ensures that a driving licence must be reviewed periodically, depending upon the frequency set. If a driving licence is not reviewed during that period, the driving licence will not be valid and the claimant will be unable to claim mileage expenses.
Driving licence must be reviewed	<p>Select the frequency that driving licences must be reviewed in order to remain valid. Select from:</p> <ul style="list-style-type: none"> <li>• Every Month</li> <li>• Every 3 Months</li> <li>• Every 6 Months</li> <li>• Every 12 Months</li> </ul>
Send reminder to claimant prior to the review expiry date	Select the check box to send a reminder to the claimant prior to their driving licence review expiry date.
Days prior to review expiry to send a reminder	<p>Select how many days prior to the claimant's driving licence expiry date that the reminder email will be sent.</p> <p><b>Note:</b> 7 days will be the default value.</p>

## Claim Options

## Claim Options

Use date of expense for duty of care checks

If enabled, Duty of Care checks will use the date that the expense was incurred instead of today's date.

The validity of a driving licence is based on the date of the expense, the start date of the licence and the last review date. Duty of Care documents marked as required will also be checked for validity on the date of the expense for the vehicle selected.

If disabled, a driving licence is not valid when:

- The last review date is older than the period set on the 'Driving licence must be reviewed' option.
- The review status is anything other than 'Reviewed - OK' or 'Automatic Lookup'.
- The licence has been populated using the automatic DVLA check, but has since expired.

Any active vehicles without valid Duty of Care documents will prevent the expense from being added even if a different vehicle is selected.

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Check claimant driving  
licences automatically



Frequency of automatic  
driving licence checks

Every 1 month



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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## Claim Options

Use date of expense for duty  
of care checks

