Manage Vehicle Journey Rate Categories

Last Modified on 20/01/2023 4:11 pm GMT

Add a Vehicle Journey Rate	Edit a Vehicle Journey Rate	Review Vehicle Journey Rates

Scenario 1 Scenario 2 Scenario 3

Permissions

You will require an Access Role with the following permissions:

- Base Information
- Vehicle Journey Rate Categories

1. Navigate from the **Home** page to **Administrative Settings | Base information | Vehicle Journey Rate Categories**. This will return a list of any existing Vehicle Journey Rate Categories.

Vehicle Journey Rate Categories

		Category Valid ▲	Vehicle Journey Rate Category	Comment	Threshold Type	Calculate Mileage Total	Unit	Currency
📝	❌	☑	Small	Own Car - 1400cc or Less (Petrol) - 1600 or Less (Diesel)	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Medium	Own Car - 1401cc to 2000cc (Petrol) - 1601cc to 2000cc (Diesel)	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Large	Own Car - 2001cc or More	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Motor Cycle	Motor Cycle	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Car Allowance Large	Car Allowance Users: Over 2000cc	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Car Allowance Medium	Car Allowance User: Petrol 1401cc to 2000cc, Diesel 1601cc to 2000cc	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Car Allowance Small	Car Allowance Users: Petrol Up To 1400cc, Diesel Up To 1600cc	Annual	☑	Mile	Pound Sterling
📝	❌	☑	Small (KM) Test	Own Car - 1400cc or Less (Petrol) - 1600 or Less (Diesel)	Annual	☑	KM	Pound Sterling

2. From the Page Options menu, click **Add Vehicle Journey Rate Category**.

Page Options
Add Vehicle Journey Rate Category
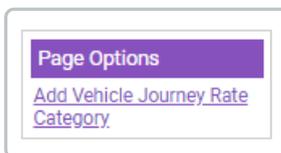
> **Note:** Click 📝 to edit an existing Vehicle Journey Rate Category.

3. Define the **General Details** of the Vehicle Journey Rate Category:

Add/Edit Vehicle Journey Rate Category
Vehicle Journey Rate Category Details

General Details

Vehicle Journey Rate Category	[_____]	Threshold Type	Annual ⌄	❓
Description	[_____]			
Currency	Pound Sterling ⌄			
Unit of measure	Miles ⌄	Calculate new journey total	☐	❓

General Details	Description
Vehicle Journey Rate Category	Select the type of threshold which applies to this Vehicle Journey Rate Category: ○ **Annual** - Checks the total number of miles accrued over the current financial year to determine which threshold rate applies. ○ **Per Journey** - The threshold will be checked for each journey.
Threshold Type	Enter a description to help identify what the purpose of the Vehicle Journey Rate Category is.
Currency	Select a currency from the drop down list to apply to this Vehicle Journey Rate Category.
Unit of Measure	Select a unit of measure to apply to the Vehicle Journey Rate Category: ○ **Miles** - The specified rate will be paid per Mile travelled. ○ **Kilometres** - The specified rate will be paid per Kilometer travelled.
Calculate New Journey Total	Select this option if you want to store a running total of the number of miles accrued by the claimant who uses this Vehicle Journey Rate Category.

Note: NHS users may also be required to enter further information such as NHS Mileage Code, Start Engine Size and End Engine Size.

4. If you have multiple Financial Years to select from, define this selection using the **Financial Year** drop-down list. If you only have one Financial Year, Assure Expenses will automatically default to this.

Add a Date Range

1. Click the **Add Date Range** link to select a Date Range Type.

Date Ranges

Add Date Range

		Date Range Type ▲	Date Value 1	Date Value 2
📝	✖			
		There are no date ranges defined for this vehicle journey rate		

Date Range Details

Date Range Type   [Before ▾]

Date value 1   [_____]   *

Thresholds

Add Threshold

		Range Type ▲	Threshold Value 1	Threshold Value 2	Rate for Passenger 1	Rate for other passengers	Rate for Heavy and Bulky Goods
📝	✖						
				There are no thresholds defined for this date range			

save   cancel

Date Range Type	Description
Before (Exclusive)	This will apply the Vehicle Journey Rate Category up to the date selected, but not including the date selected. You are only able to add **one Before** Date Range per Vehicle Journey Rate Category.
After or equal to (Inclusive)	This will apply the Vehicle Journey Rate Category on or after the date specified. You are only able to add **one After or equal to** Date Range per Vehicle Journey Rate Category.
Between (Inclusive)	This will apply the Vehicle Journey Rate Category between the two dates selected, including the selected dates.
Any	This will apply the Vehicle Journey Rate to all dates.

2. Enter the date/s into the **Date Value** field/s for the duration that the Vehicle Journey Rate Category will apply.

Add Threshold Details

1. Within the Add Date Range window, click the **Add Threshold** link.

2. The Threshold Range Type rules can adjust the rates so that once the claimant exceeds the set threshold the correct rate is applied automatically. Enter the mileage threshold/s in the **Threshold Value** field/s.

Range Type	Description
Less Than (Exclusive)	This will apply the correct rate up to the mileage threshold which is defined, but not including the mileage threshold specifically. You are only able to add **one Less Than** threshold per Date Range.
Greater than or equal to (Inclusive)	This will apply the correct rate to mileage greater than or equal to the mileage threshold which is defined. You are only able to add **one After or equal to** threshold per Date Range.
Between (Inclusive)	This will apply the correct rate between the two mileage thresholds which have been defined, including the threshold values specifically.
Any	This will apply the correct rate to all mileage thresholds.

3. Click the **Add Fuel Rate** link to define a Fuel Rate to apply to the threshold.

Fuel Rate

Vehicle engine type*   [None] ▾   ❓

Rate per mile/KM*   ❓

Amount for VAT*   ❓

save   cancel

Option	Description
Vehicle engine type (Mandatory)	Select the vehicle engine type from the **Vehicle Engine Type** drop-down list. For more information on Vehicle Engine Types, view Manage Vehicle Engine Types.
Rate per mile/Km (Mandatory)	Enter a **Rate per mile/KM**. This is the rate the claimant will be paid for each mile/Km they claim for. For example, entering 0.25 will pay the claimant £0.25 per mile/KM claimed.
Amount for VAT (Mandatory)	Enter the amount per mile/Km which is subject to **VAT**. This number must be **less than or equal to** the **Rate per mile/KM**.

4. Click **Save** to store the Fuel Rate.

5. In the Additional Rates section, enter the rates for carrying passengers or heavy and bulky goods, if applicable. If a claimant specifies that on their journey, they were carrying a passenger or heavy and bulky goods, the rates defined will be also be paid on top of the normal rate.

Additional Rates

Rate for Passenger 1   Rate for other passengers

Rate for Heavy and Bulky Goods

save   cancel

6. Once all the rates have been entered, continue to **click Save** until you are directed back to the Vehicle Journey Rate Categories page.

For more detailed scenarios of setting up a Vehicle Journey Rate Category, view the tabs at the top of this page.

Note: You will need to create a new vehicle journey rate category for each engine size. You can find a list of advisory fuel rates based on engine sizes by visiting GOV.UK.