

# Removals and Relocation Assistance Policy and Procedure

This policy describes and outlines the financial assistance for staff who are required to relocate their home to take up a new appointment.

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**Version Control and Summary of Changes**

<b>Version number</b>	<b>Date</b>	<b>Comments (description change and amendments)</b>
2	2.2.12	Equality and Due Regard statement Added

**All LPT Policies can be provided in large print or Braille formats, if requested, and an interpreting service is available to individuals of different nationalities who require them.**

**For further information contact:**

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## Definitions that apply to this Policy

<b>Due Regard</b>	Having <b>due regard</b> for advancing equality involves: <ul style="list-style-type: none"><li>• Removing or minimising disadvantages suffered by people due to their protected characteristics.</li><li>• Taking steps to meet the needs of people from protected groups where these are different from the needs of other people.</li><li>• Encouraging people from protected groups to participate in public life or in other activities where their participation is disproportionately low</li></ul>
<b>Removals and Relocation</b>	A change in the physical location of an employee due to taking up a new post within the organisation
<b>HMRC</b>	HM Revenue and Customs – the Government department responsible for payment of taxes.

# **REMOVALS AND RELOCATION ASSISTANCE POLICY AND PROCEDURE**

## **Equality Statement**

Leicestershire Partnership NHS Trust (LPT) aims to design and implement policy documents that meet the diverse needs of our service, population and workforce, ensuring that none are placed at a disadvantage over others. It takes into account the provisions of the Equality Act 2010 and advances equal opportunities for all. This document has been assessed to ensure that no one receives less favourable treatment on the protected characteristics of their age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex (gender) or sexual orientation.

In carrying out its functions, LPT must have due regard to the different needs of different protected equality groups in their area. This applies to all the activities for which LPT is responsible, including policy development, review and implementation.

## **1.0 Introduction**

- 1.1 The cost of moving home can involve significant expense. In order to attract applicants to key posts in the Trust it may be appropriate to offer financial assistance to staff who are required to relocate their home to take up a new appointment.
- 1.2 The underlying principle of the policy is to offer assistance towards the costs of relocation, not full reimbursement.

## **2.0 Scope of the policy**

- 2.1 This policy applies to all staff in key posts. Key posts are likely to be either senior posts or those where recruitment difficulties can be anticipated. In certain circumstances, a key post may be a fixed term appointment or a member of staff in a rotational training appointment (e.g. junior doctor).
- 2.2 Financial assistance for removals and relocation is principally intended for new staff joining the Trust. It will not normally be offered to established members of staff who move between appointments with the Trust.
- 2.3 The decision to offer any assistance with relocation expenses and the level of such assistance will be at the discretion of management. It is not an entitlement and may not necessarily fully reimburse the actual expenditure. Management discretion also operates within the framework of allowable relocation expenses laid down by the taxation authorities (see Appendix 1).

## **3.0 Aims of the policy**

- 3.1 To enable an accurate estimation of the full recruitment cost.

- 3.2 To ensure consistent application between eligible employees.
- 3.3 To ensure that eligible employees understand the conditions and limits of any assistance with expenses.
- 3.4 To ensure that a clear record of all approved expenses is available for audit purposes.

#### **4.0 Trust Management responsibilities - Pre-appointment**

- 4.1 The appointing/budget manager must be satisfied that reimbursement of removal expenses is likely to be appropriate and necessary, because any prospective employee is regarded as filling a key or "difficult to appoint" to post.
- 4.2 The decision to offer relocation assistance expenses and the amount to be paid (up to the maximum limits, see section 6, below) should be made by the appointing/budget manager and the appropriate Director/Clinical Director before a post is advertised with advice from HR/Medical Staffing Manager.
- 4.3 The Trust has a responsibility to administer public funds responsibly and must be satisfied that public funds are being spent appropriately and equitably. This includes the Trust's ability to make best value for money decisions based on the use of comparative information.
- 4.4 Job advertisements should include a statement confirming that successful applicant may be eligible for assistance with relocation expenses.
- 4.5 The appointee's eligibility to receive relocation assistance and the maximum amount payable should be established following interview.
- 4.6 When determining whether assistance with relocation and removals should be offered, the appointing/budget manager must:
  - a) be satisfied that no other equally suitable candidate is available or is likely to be available in the prevailing circumstances; and
  - b) be satisfied that where it is necessary to agree to provide assistance e.g. a candidate will not accept the post unless some assistance is available;
- 4.7 Within the terms and conditions of this policy actual relocation assistance expenses up to the maximum limits can be agreed by the appropriate Director/Clinical Director. The only exception to this is when the appointee is an Executive Director, in which case the Trust Board Remuneration Committee must agree that relocation assistance expenses are to be offered.
- 4.8 If, in very exceptional circumstances, a Director/Clinical Director believes it is necessary to offer financial assistance in excess of the above-mentioned limit, an application in writing for approval must be made to the Trust Board

Remuneration Committee. Such an application must include: detailed justifiable reasons for the request; the amount of the additional financial assistance being requested; and confirmation that the recruiting area accepts responsibility for any budgetary consequences.

- 4.9 If the Trust Board Remuneration Committee should agree to a request to offer financial assistance in excess of the maximum limit, this will constitute an *ad hoc* payment for which the employee will undertake to accept sole responsibility for any personal taxation liability.
- 4.10 In any event, the *ad hoc* payment will only be made against receipted expenses as determined within Appendix 2 and which are not otherwise reimbursable within the £8,000 relocation assistance non-taxable limit.
- 4.11 Relocation expenses will be charged to the employee's department budget.

## **5.0 Terms and conditions of approval**

- 5.1 Relocation of the employee's home is necessary because he/she currently lives beyond a reasonable normal daily traveling distance from their main work base, i.e. the employee lives outside of the East Midlands area.
- 5.2 An employee must not financially profit from being granted relocation assistance. The expenses to be reimbursed must be necessary and unavoidable and, where appropriate, limited to the costs of broadly comparable accommodation (a comparable property is one of similar size/location to that in the previous area). Employees may be required to demonstrate comparability, in which case any costs of so doing will be reclaimable under this scheme.
- 5.3 Expenses to be reimbursed are limited to those determined by the appointing/budget manager in accordance with this policy.
- 5.4 The employee moves to permanent accommodation within 6 months of the date of commencement in the new post. Where the employee is able to demonstrate good reason for a delay in relocating, this can be extended up to 12 months by agreement with the appropriate Director on the advice of the Head of Human Resources. In any event, there will be no reimbursement of rent or travel home after 6 months from appointment.
- 5.5 In addition to the time limits set out in paragraph 5.4 above, all claims for payment under this policy should be made within 12 months of appointment to the post that necessitates relocation. This time limit may be extended to 18 months at the discretion of the Trust.
- 5.6 Notwithstanding 5.5 above, relocation expenses should be reclaimed before the end of the tax year following that in which an employee starts their new post. Any claims made after this Inland Revenue time limit will not qualify for tax relief and the employee will be personally liable for any personal taxation liability.

- 5.7 The new permanent accommodation must be;
- within Leicester, Leicestershire, Rutland or a neighbouring county; and
  - Within 25 miles of the main work base (and if the employee's duties include being on-call, the accommodation must be within 40 minutes of normal travelling time).
- 5.8 Employees may claim for one move only. Where an employee moves to temporary accommodation prior to a move to permanent accommodation, he/she may claim for expenses incurred in the second move, but only within the overall limit of relocation assistance that has been agreed.
- 5.9 Relocation expenses are not recoverable from any other source, including where a partner is separately eligible to reclaim relocation expenses. If relocation expenses are recoverable from another source, the Trust may still offer some assistance, but only to the extent that the assistance from another source and assistance from the Trust are not for the same expense items and the combined total assistance from both sources does not exceed the £8,000 maximum allowance.
- 5.10 The Trust will not under any circumstances reimburse the cost of bridging loans.
- 5.11 Employees are solely responsible for any personal taxation liability arising from the reimbursement of relocation expenses.
- 5.12 In accepting assistance with relocation expenses the employee will normally be expected to remain in Trust employment for a minimum period of 2 years (or until the end of their appointment, if appointed on a fixed-term contract or into a rotational training appointment), or otherwise be liable to repay in total or proportionately the costs reimbursed.
- 5.13 Any staff appointed on the basis of an indefinite (i.e. permanent) contract that leave the employment of the Trust before they have completed 2 years service will be required to refund a percentage of relocation assistance they have received (including any *ad hoc* payment made under 4.9 above). If the employee leaves:
- |  |        |
|--|--------|
| - within 6 months of commencement      | = 100% |
| - after 6 months but before 12 months  | = 75%  |
| - after 12 months but before 18 months | = 50%  |
| - after 18 months but before 24 months | = 25%  |
- 5.14 Any staff appointed on a fixed term contract or into a rotational training post that leaves the employment of the Trust before completion of their period of appointment will be required to refund a percentage of relocation assistance in proportion to the formula in 5.13 above.

- 5.15 Relocation assistance will not normally be repayable by the employee where their employment is terminated by the Trust, unless the employment is terminated for reasons of gross misconduct.

## **6.0 Relocation Assistance Maximum Limits**

- 6.1 The **maximum** level of assistance that can be offered under this policy to staff on an indefinite contract or to staff on a fixed term contract of two years or more is £8,000.
- 6.2 Employees on a fixed-term contract of at least one year but less than two years in length may be reimbursed up to a pro rata amount depending on the length of their contract (e.g. an employee on a 12 month contract can be offered up to £4,000).
- 6.3 Within the **maximum** limits set out above, the **actual** level of any assistance (which may be lower) will be decided on a 'case-by-case' basis by the appointing/budget manager and the appropriate Director/Clinical Director with advice from HR/Medical Staffing Manager.
- 6.4 Employees on fixed term contracts or staff appointed to rotational training posts less than one year in length are eligible to apply for assistance with removals only (see 7.7)
- 6.5 If staff appointed on a fixed-term contract or into a rotational training appointment subsequently have their appointment extended or made indefinite (i.e. 'permanent'), they will not be eligible for further relocation assistance in addition to that already agreed.

## **7.0 Relocation Assistance Allowances**

- 7.1 Where an employee chooses to retain their old home and purchase a new home in Leicester, Leicestershire or Rutland expenses under 7.5 and 7.10 are not eligible for reimbursement.
- 7.2 Employees who are existing owner occupiers intending to sell their property in order to relocate will be eligible to reclaim expenses detailed in 7.4-7.10, subject to their maximum allowance.
- 7.3 Employees who are not already owner occupiers are not eligible to apply for expenses under 7.5
- 7.4 Preliminary visits to new area and for superintending removal:  
Travel expenses at Public Transport rates (2nd class) for employee and family to search for accommodation and to superintend removal. Up to 5 nights may be claimed for employee and family at current Travelodge rates. (Family is defined as those persons who permanently reside with the eligible employee)
- 7.5 Legal and related expenses connected with house sale/purchase:

***(claimable only if the employee is an existing owner occupier and has a contract of at least one year in length – Documentary evidence to verify owner occupier status will be required i.e. Mortgage statement, Land Registry print out, solicitor correspondence)***

a) House sale: solicitor's fees, legal expenses for mortgage redemption, estate agents/auctioneers fees

b) House purchase\*: solicitors fees, legal expenses for mortgage application, stamp duty, land registry fees, search fees, private and lenders survey, and wiring/drains tests and will be paid for one property only

c) Abandoned purchase - depending on the circumstances, where an employee abandons the purchase of a property, or a property is withdrawn he/she may be reimbursed legal costs at the discretion of the Clinical Director/Director.

*\*re. House purchase – since relocation assistance is based on the costs of moving to broadly comparable accommodation, reimbursement may be limited up to a notional purchase price equivalent to the property being sold, as assessed by a local estate agent appointed by the Trust.*

7.6 Rental/Tenancy Agreement:

Reasonable expenses associated with setting up a rental/tenancy agreement, not including any deposit paid, or monthly rental payments. Sight of the tenancy agreement will be required.

7.7 Removal Expenses, Storage Costs of Furniture and Effects:

Three independent quotations must be obtained by the employee and each submitted with the claim. The Trust will make enquiries to verify all three quotations and usually the lowest will be paid. However, the Trust may also obtain independent quotes via online removal quote websites as part of their assessment process and a lower amount may be paid if a lower quote is obtained. Emailed quotes may be accepted when submitted with a completed claim form. A receipt must also be submitted with the claim, confirming the amount paid.

It is expected that the quotations will provide the following information as a minimum:

- Exact location of the move including full postal address from and to
- Information on the size of the move i.e. contents of a flat or number of rooms
- Duration of the move
- Type of removal vehicle required
- Whether insurance, packing service, boxes etc are included
- Estimated cost (including VAT if appropriate)

7.8 Miscellaneous Expenses:

The Trust will reimburse the costs of connection of services (gas, electricity and telephone), removal of special items of furniture and the taking down and fitting of fixtures and carpets where professional services are required, **subject to a maximum total cost of £2,000**

7.9 Non-UK Residents Taking-up Appointment:

Travel costs will be limited to costs from the port of entry to the UK only. The cost of removals and relocation will be reimbursed up to the maximum limit as described under section 6.1 – 6.4

7.10 Temporary Accommodation/Excess Daily Traveling Expenses:

***(claimable only if the employee has a contract of at least 12 months in length)***

a) Where an employee has taken up the post before the previous home is sold, or has not found suitable replacement rented family accommodation, and has left the family behind, or is incurring continuing costs on his or her existing property:-

- i) Single hospital accommodation or, if not available, bed and breakfast
- ii) Where an employee decides to commute excess daily traveling expenses at the 'non-taxable excess mileage' rate

b) Where an employee has taken up the post and moved his or her family into the area before the previous home is sold, and is incurring continuing costs on previous property:-

- i) Hospital family accommodation or if not available the cost of comparable temporary accommodation based on current Trust rental charges.

The employee will be required to provide evidence that they are marketing their previous home for sale.

These costs are deductible against the total level of assistance agreed for reimbursement. Where these costs continue to the extent that the total agreed relocation package is exhausted, then the employee will be expected to meet any additional costs incurred, which may include a deduction from salary where hospital accommodation is occupied.

**There will be no reimbursement of rent or travel home after 6 months from appointment.**

## 8.0 Claims Procedure

8.1 Applicants should complete the 'Application for Assistance with Relocation Expenses' form (Appendix 2). It is the responsibility of the employee to make sure their claim complies with the requirements of the scheme. The burden of proof rests with the employee to substantiate their claim to the satisfaction of the Trust prior to any payments being made.

- 8.2 Claims for reimbursement of expenses should be made using the claim form (Appendix 3 and 4). Reimbursement of expenses will, where appropriate, be on the basis of positive proof that expenses have been incurred: original receipted accounts or vouchers must therefore be submitted with claims for reimbursement. Claims may not be approved where insufficient evidence has been provided to support the claim.
- 8.3 All claims for reimbursement of agreed relocation expenses will need to be approved by the appointing/budget manager and forwarded to the HR or Medical Staffing Department, to be reconciled and monitored against the assistance limits that have been agreed.
- 8.4 Where 'free' hospital accommodation is provided, the notional costs will be deducted from the assistance payable.
- 8.5 In the case of large expenses where paying these could result in financial difficulty to the employee, special arrangements may be made for the Trust to pay these direct to the supplier, provided that they can be met within the overall maximum level of assistance which has been agreed and paid to that date.
- 8.6 All expenses should be claimed at the time costs are incurred and all claims must be made within the timescales set out in 5.4.

**9.0 Monitoring Compliance and Effectiveness**

<b>Criteria</b>	<b>Measurable</b>	<b>Frequency</b>	<b>Reporting to</b>	<b>Action Plan/Monitoring</b>
Record request for assistance	Number of claims/Request for assistance without any issues arising	Annually	WOD	Head of HR
Record costs to the organisation of relocation	Monitor increase in annual costs to the organisation	Annually	WOD	Head of HR
Number of Grievances / Complaints regarding the application of the policy	Review HR data	Monthly	WOD	Head of HR

## 10.0 Stakeholders and Consultation

10.1 Workforce and Organisational Development Policies are subject to joint monitoring and review between management and staffside through the JSCNC. Guidance in relation to Due Regard for this policy has also been received by the Policy group and the Integrated Equality and Human Rights Service. Management consultation has also been undertaken in relation to this policy.

## 11. Due Regard

The Trusts commitment to equality means that this policy has been screened in relation to paying due regard to the general duty (Equality Act 2010) in relation to the relevant protected characteristics, the use of comprehensible, inclusive language, and the avoidance of stereotypes. This is evidenced for example by the following;

- Section 7.4 - Travel expenses at Public Transport rates (2nd class) for employee and family to search for accommodation and to superintend removal. Up to 5 nights may be claimed for employee and family at current Travelodge rates. (Family is defined as those persons who permanently reside with the eligible employee)
- Section 7.9 Non-UK Residents Taking-up Appointment:  
Travel costs will be limited to costs from the port of entry to the UK only. The cost of removals and relocation will be reimbursed up to the maximum limit as described under section 6.1 – 6.4
- Section 8.5 In the case of large expenses where paying these could result in financial difficulty to the employee, special arrangements may be made for the Trust to pay these direct to the supplier, provided that they can be met within the overall maximum level of assistance which has been agreed and paid to that date

## 12.0 Links to Standards/Performance Indicators

TARGET/STANDARDS	KEY PERFORMANCE INDICATOR
Care Quality Commission registration standards (outcome 12) <i>Requirements relating to workers</i> regulation (21) of the Health & Social Care Act (2008) (Regulated Activities Regulations 2010 <a href="#">CQC essential standards</a> )	That the trust maintains compliance with CQC registration standards, this policy supports outcome standards 12

## 13.0 Dissemination and Implementation

The policy is approved by the Leicestershire Partnership NHS Trust Workforce and OD Committee and is accepted as a Trust wide policy. This policy will be disseminated immediately throughout the Trust following ratification.

The dissemination and implementation process is:

- Line-Managers will convey the contents of this policy to their staff
- Staff will be made aware of this policy using existing staff newsletters and team briefings
- The policy will be published and made available on the Intranet

**REMOVALS AND RELOCATION ASSISTANCE POLICY AND PROCEDURE**

**TAXATION IMPLICATIONS OF REMOVAL EXPENSES**

The Finance Act 1993 has introduced certain statutory regulations relating to the liability of employees for taxation on removal expenses. It is a requirement that all employees in receipt of relocation expenses read the following summary of the regulations.

Employees will be exempt from taxation on removal expenses where the following conditions apply:

1. The expenses and benefits received must not exceed a total of £8,000.
2. The expenses and benefits should arise as a result of a job-related change in the employee's sole or main residence.
3. The old home should not be within reasonable daily travelling distance of the new place of work.
4. The expenses and benefits must be incurred or provided before the end of the tax year following the year in which the employee's job is changed or moved or a new job started.
5. The expenses or benefits received must fall into the Inland Revenue 'eligible' category.

It is anticipated that the majority of expenses and benefits available under the Leicestershire Partnership NHS Trust's scheme will be 'eligible'. To be exempt from taxation, an employee need not necessarily dispose of his/her old house, but it should no longer be his/her main residence after the move. For instance, where an employee rents out the old home or visits it at weekends, the new home would become the main residence and in this case tax relief is available on expenses and benefits received. However, where an employee rents or buys accommodation near the place of work, but his/her family stays behind in the old home, it is unlikely that the new accommodation would be regarded as the employee's main residence. However, where there is a doubt, the exact definition of 'main residence' may be agreed with the Inland Revenue in each case.

These regulations apply to anyone starting a new job, or whose job is moved to a different location.

For further information on the taxation implication of removals and relocation assistance expenses, employees should read the Inland Revenue's short guide 'Income tax and National Insurance contributions on relocation packages' (Personal Taxpayers Series, IR134).

**LEICESTERSHIRE PARTNERSHIP NHS TRUST****REMOVALS AND RELOCATION ASSISTANCE POLICY AND PROCEDURE****APPLICATION FOR ASSISTANCE WITH RELOCATION EXPENSES****To be completed by the employee:**

Name:		
Post to which appointed:	Grade:	
Department:	Commencement date:	
Contract type: Permanent / Fixed Term / Rotational Training Post *		
If the contract is <u>not</u> permanent please confirm the end date: .....		
Address relocating from:	Please tick, is this:	Property type:
	Owned/Mortgaged <input type="checkbox"/>	Flat/Apartment <input type="checkbox"/>
	Rented (furnished) <input type="checkbox"/>	Terrace/Town House <input type="checkbox"/>
	Rented (unfurnished) <input type="checkbox"/>	Semi Detached <input type="checkbox"/>
		Detached <input type="checkbox"/>
Address relocating to:	Please tick, is this:	Property type:
	Owned/Mortgaged <input type="checkbox"/>	Flat/Apartment <input type="checkbox"/>
	Rented (furnished) <input type="checkbox"/>	Terrace/Town House <input type="checkbox"/>
	Rented (unfurnished) <input type="checkbox"/>	Semi Detached <input type="checkbox"/>
		Detached <input type="checkbox"/>
If you own your old home, do you intend to sell it to relocate? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Please note that you will be required to provide regular progress update reports, supported by evidence, or signed declarations by the claimant. You may also be asked to provide proof that the property is empty.		
If you have moved/are moving into Trust accommodation, will this be provided free of charge?: Yes <input type="checkbox"/> No <input type="checkbox"/>		
Continued ..		

Approved expenses will be reimbursed by BACS transfer. Please provide the following details:

Name of Bank: ..... Account Name: .....

Account Number: ..... Sort Code: .....

**EMPLOYEE'S DECLARATION:**

In accepting this offer of financial assistance towards the costs of relocation, I;

- confirm that I have read and understood the Trust's Removals and Relocation Policy
- confirm that the information detailed on the form and any supporting documentary evidence is correct.
- confirm that none of the expenses to be claimed are recoverable in full or in part from any other source
- agree that I will remain in employment with the Trust for a period of not less than 2 years *(or until the end of my fixed-term/rotational appointment, as appropriate)*
- accept that if I leave my employment with the Trust before 2 years *(or before the end of my fixed-term/rotational appointment, as appropriate)* then I will refund relocation assistance expenses received at the rates set out in Section 5.13 of the Trust's Policy
- agree that if I continue to occupy hospital accommodation after the maximum value of the relocation assistance stated above has been exhausted, then deductions can be made from my salary for the rental charge of that accommodation.

Signed: ..... Date .....

**To be completed by the budget holder:**

In accordance with the Trust's policy on assistance with relocation expenses, it is agreed that *(name)*..... will be eligible to reclaim relocation expenses incurred up to a maximum of £.....

Budget code to which expenses should be charged: .....  
(code for employee's department)

Signed ..... Position.....

Date: .....



**Removals and Relocation Assistance Claim Form**

**EMPLOYEE'S DECLARATION:**

- I declare that the information I have given on this claim form is correct and complete.
- I confirm that the quotations I have provided are genuine and come from three different and independent firms/companies.
- I confirm that I have incurred the expenditure claimed and that none of the expenses being claimed are recoverable in full, or in part from any other source, party, Trust or Organisation.
- I understand that the Trust may take action against me, including disciplinary action, civil recovery and/or criminal proceedings if the information I have supplied is found to be incorrect, or incomplete.
- I hereby give my consent for the information supplied to be exchanged with third parties in order to validate my claim and/or the purposes of the prevention and/or detection of crime.

Signed: ..... Date: .....



... Continued

**Relocation Mileage Claim Form**

Have you travelled by the shortest practicable route?      Yes       No   
If not, please provide further information:

.....  
.....

If there are any exceptional expenses such as the use of a taxi, please explain why this was necessary:

.....  
.....

Signed: .....(Claimant)      Date: .....

Authorised:.....(Relocation Co-ordinator) Date: .....

**LEICESTERSHIRE PARTNERSHIP NHS TRUST**

**REMOVALS AND RELOCATION ASSISTANCE POLICY AND PROCEDURE**

**INFORMATION FOR DOCTORS APPOINTED TO ROTATIONAL TRAINING POSTS**

Doctors appointed to the rotational training scheme may be placed in either Leicestershire or Northamptonshire.

Where a doctor commences their first placement in Leicester and wishes to relocate to Leicester, relocation assistance will be considered under the terms of the policy. Excess travel incurred as a subsequent rotation to Northamptonshire will be considered outwith the relocation policy.

Where a doctor commences their first placement in Northamptonshire, the doctor may wish to delay relocation until they commence their placement in Leicester 12 months later. In this instance the timescales referred to in paragraph 5.4 of the policy would be waived. However the individual should be aware of the Inland Revenue time limits as detailed in paragraph 5.6.