

## Protocol for the payment of Sign-Up Bonuses and Relocation Bonus

The Enhanced Sign-Up Bonus, Standard Sign-Up Bonus and Relocation Bonus will be paid to Band 5 to Band 7 practising Qualified Nurses or Allied Health Professionals who have applied for Registered Nurse/Lead Practitioner vacancies will be eligible for payment as set out below, provided the conditions listed are met.

### Eligibility for Sign-Up Bonuses and Relocation Bonus

- The post was advertised as being eligible for the bonus payments
- Applicants are not currently employed by the Trust on a substantive contract in one of the specified roles. Internal candidates who apply for a side-ways move or promotion are not eligible, but staff stepping into a qualified role after completion of training or moving from a role within Corporate Services to a clinical facing role are eligible.
- If you previously worked for the Trust then to be eligible for the bonus payments the gap after leaving the Trust would need to be 2 years (24 months) or longer. This also applies to those who have retired.

### Payment

#### 1. Enhanced or Standard Sign-Up Bonus

Payment is made in three instalments as follows:

	<b>Standard</b>	<b>Enhanced</b>
On Appointment (in first month's salary)	£2,000	£4,000
12-month anniversary	£1,000	£2,000
24-month anniversary	£1,000	£2,000

- Payments are eligible for the deduction of Tax and National Insurance but would not be pensionable.
- The Enhanced and Standard Sign-Up Bonuses are pro-rata'd for part time staff.

- In the event of an internal move within the 2 year period to a post not attracting the Sign-Up Bonus any payments made, or outstanding, will be reviewed on a case by case basis.

## **2. Relocation Bonus**

You may claim up to £8,000 towards the costs of relocating and/or accommodation costs (see Appendix 1 for further details and conditions of payment) as follows:

- To be eligible for a relocation bonus you must have:
  - Permanently relocated at least 30 miles away from your new work base, and moved within a 30 mile radius of your new work base.
  - Payments will be tax free conditional upon receipts being provided.
  - No payment can be made until after you have started and claims may be staggered.
  - In the event of an internal move during the 2 year period to a post not attracting the relocation bonus any payments made, or outstanding, will be reviewed on a case by case basis.

The Manager/Recruitment Team will clearly state on the recruitment paperwork if the post is eligible for one of the Sign-Up Bonuses and/or Relocation Bonus, subject to meeting the relevant criteria. The monies will come out of the Recruiting Managers budget unless an alternative budget code is supplied by them.

### **Internal Moves**

When a member of staff who is in receipt of a Sign-Up Bonus and/or Relocation Bonus moves internally (side-ways or promotion) during the two year period, the payment will be apportioned to the original/new service accordingly. Any movement to a post not attracting the Sign-Up Bonus and/or Relocation Bonus will be considered on a case by case basis.

### **Return of Payment**

When a member of staff who is in receipt of a Sign-Up Bonus and/or Relocation Bonus leaves a substantive post within the Trust they will be required to return some or all of the payment received from their final month's salary as detailed below:

Less than 12 months	100%
From 12 - 18 Months	75%
From 18 - 24 months	50%

The provision to return payment will not apply where the HR Director or delegated Director is satisfied that the staff member has ceased work due to:

- Enforced early retirement due to illness or injury.
- Death.
- Exceptional personal circumstances and with the approval of the HR Director or delegated Director.
- Maternity (or other extended parenting leave agreed by the HR Director or delegated Director) provided the employee gives an undertaking to return to practice and does so within a reasonable period, to be considered on a case by case basis. As a minimum, absences of up to one year will normally be considered reasonable, but requests for longer periods should be considered by the HR Director or delegated Director.

### **Absence**

Periods of absence shall not be included in the two-year period of time for eligibility for the Sign-Up Bonuses and/or Relocation Bonus including maternity, sickness (over 7 calendar days), career break and suspension. If an individual does not return from their absence to complete the year and have been in receipt of the Sign-Up Bonus and/or Relocation Bonus the Trust will recover the monies owed.

## Relocation Bonus

Relocation must be completed within 12 months of starting in post.

Relocation is defined for Homeowners as the sale of their current property and purchase or rental of a property within the defined area. For Non-Homeowners relocation is defined as disposal of their current rented property and rental of a property within the defined area.

**Original receipts** must be produced as proof of expenses before reimbursement will be made.

It is the responsibility of managers to notify Payroll on the termination notice whether an employee who has less than two years' service with the Trust has been granted relocation expenses.

If an employee receives monies for relocation and does not relocate within the agreed timescale, the Trust will reclaim the payments. The employee will be expected to provide confirmation and supporting evidence to the manager that they have moved within the agreed timescales.

Payment will only be made against receipts after the expenses have been incurred.

The member of staff may use the total sum flexibly as long as it is used for the following purposes.

### Homeowners

- a. Furniture removal and storage
  - The lowest of 3 quotations for removal of furniture and belongings, inclusive of storage charges and insurance, where appropriate. Storage charges will not be reimbursed where there is no intention to move the property to the new residence.
  - Travel expenses for one return journey home if necessary to supervise the removal
- b. Legal and other expenses incurred in the house sale
  - solicitors and other legal fees
  - estate agents fees or advertising costs
  - mortgage redemption fee
- c. Legal and other expenses incurred in the house purchase

- solicitors and other legal fees e.g. land registry fees, mortgage application fees, stamp duty
  - surveyor's report
- d. Tenancy Agreements (if there is a need to rent during the relocation period)
- legal and other costs incurred in terminating/starting up tenancy agreements
- e. Search for new accommodation
- travel expense actually incurred for one return journey home, if search is undertaken prior to taking up new post
- f. Miscellaneous expenses, essential items integral in previous home e.g. carpets, curtains, fridge, cooker. Items such as satellite/ cable installation and dishwashers are not included, unless agreed by management discretion. Payment will not be reimbursed for expenses which are not essential to the sale or purchase of the property e.g. expenses relating to renovation or redecoration Payment will generally not be considered for any costs that would be considered non-exempt relocation expenses by her Majesty's Revenue and Customs.
- g. Property rental during the relocation period

### **Non-Homeowners**

- h. rent
- i. Furniture removal and storage – as in a. above
- j. Tenancy Agreement – as in d. above
- k. Travelling and accommodation expenses during the relocation period - as in e. and g. above
- l. Miscellaneous expenses – as in f. above.

### **Taxation**

The majority of elements of relocation expenses are normally exempt from tax provided that:

- l. they are properly receipted, and
- m. within the cost limit set, and

- n. relocation is completed by the end of the tax year following the one in which the post holder came into post. For example if the post-holder takes up post on 1<sup>st</sup> July 2007, relocation must have been completed by 31<sup>st</sup> March 2009.

The Trust is required to declare payments for tax purposes annually. Any queries on the taxation circumstance for individuals must be taken up with the Tax Office. The Trust is not in a position to advise on such matters.

Further guidance is available from your local Tax Office.

### **Process of Application**

The Recruitment Team will confirm in the offer letter/Terms and Conditions of Employment that the claimant is eligible to apply for accommodation / relocation expenses and will send them a claim form.

### **Making a Claim**

Each time a claimant wishes to make a claim s/he should complete a Claim for Relocation (Repayment) form. Full details of the claim should be submitted with supporting receipts or travel claim forms as appropriate. Claims should be submitted as soon as possible after the expense has been incurred.

The completed claim form and receipts should be forwarded to the line manager for checking that the claim is within the agreed amount and supported by **original receipts** and authorisation.

Once authorised the line manager should send the form with original receipts to Payroll for reimbursement in the next appropriate pay run. The Line manager should retain a copy of this form for their records.

### **Recovery**

If a member of staff leaves before completing two years of service the manager completing a termination notice must specify on the form that relocation assistance has been granted and how much has been paid. The termination form must be completed and submitted to Human Resources as soon as the manager is aware of the resignation.

Providing the Record of Relocation Expenses Form is submitted promptly, Payroll will be responsible for arranging recovery in the manner specified on the repayment agreement form. If it is not possible to recover payments owed the Trusts normal overpayment process will be followed.

### Claim for Accommodation Relocation Expenses

<b>NAME:</b>		<b>WARD / DEPARTMENT:</b>	
<b>JOB TITLE:</b>		<b>HOURS OF WORK:</b> (state hours per week)	

TYPE OF EXPENSE (see notes overleaf)	DESCRIPTION OF EXPENSES CLAIMED	AMOUNT CLAIMED
Costs of Disposing of Previous Home		
Costs of Acquiring New Home		
Costs of Moving Possessions		
Tenancy agreements and letting fees		
Rent		
Approved Miscellaneous expenses		
<b>TOTAL AMOUNT CLAIMED:</b> <b>(Up to a maximum of £2000 ((pro rata for part time staff))</b>		

## Declaration

1. I wish to apply for relocation expenses in accordance with the Trust's protocol for the payment of golden hello or accommodation / relocation allowance, which I have read.
2. I confirm that the claims I shall make will be necessarily incurred by me as a result of my appointment to a post with the Trust.
3. I also confirm that:
  - a) None of the expenses claimed are recoverable from any other source.
  - b) In the event of terminating my employment with the Trust within two years I shall repay the amount as detailed in the Trust's protocol for the payment of golden hello or accommodation / relocation allowance,
  - c) I understand that agreement to pay the full sum will cease if a move to permanent accommodation has not taken place within one year of taking up appointment.
4. Homeowners only:

I can confirm that I shall be selling the property which I current own in order to purchase a permanent property in the new area.

Signed \_\_\_\_\_ Date \_\_\_\_\_

<b>LINE MANAGER APPROVAL:</b>	
Relocation expenses approved to a maximum of £_____	
Existing Homeowner/Existing Tenant*	
<i>*please delete as applicable</i>	
Receipts attached : YES / NO*	
<i>*please delete as applicable</i>	
Authorised (please print)	Signature:
Designation:	Date:

**Please send completed form, with receipts attached to Payroll**