

## HR.07 – Relocation Policy

### Document Summary

The policy sets out the Trust’s approach to the payment of relocation and related expenses, including eligibility criteria, entitlements, and processes to be followed.

<b>Document Number &amp; Version</b>	HR.07 V1
<b>Date Ratified</b>	July 2021
<b>Committee Ratified at</b>	Policy Review Group
<b>Date Implemented</b>	July 2021
<b>Next Review Date</b>	July 2026
<b>Accountable Director</b>	Director of HR & OD
<b>Document Author(s)</b>	Head of Resourcing

### Important Note:

**The Intranet version of this document is the only version that is maintained.**

Any printed copies should therefore be viewed as “uncontrolled” and, as such, may not necessarily contain the latest updates and amendments.

After the Review Date has expired, this document may not be up-to-date. Please contact the document owner to check the status after the Review Date shown above.

If you would like help to understand this document, or would like it in another format or language, please contact the document owner.

## Document Submission Cover Sheet

**Committee / Group Name:** JNCC

Please choose      **New Document**       **Revised Document**

<i>Type of Document</i>	<b>Policy</b>	<i>If other state:</i>
<i>Reason for submission</i> <input checked="" type="checkbox"/> :    For approval <input type="checkbox"/> For Ratification <input checked="" type="checkbox"/> For noting <input type="checkbox"/>		

<i>Applicable to</i> <input checked="" type="checkbox"/> : <b>Trust wide</b> <input checked="" type="checkbox"/>			
<b>Division:</b>	Surgical <input type="checkbox"/>	Medical <input type="checkbox"/>	Integrated Care <input type="checkbox"/>
			Clinical Support <input type="checkbox"/>
<b>Directorate / Specialty</b> <i>give detail</i> _____			

<b>Document Title:</b> <i>(succinct &amp; key word first)</i>	Relocation Policy		
<b>Your Ref No:</b>	HR.07	<b>Version:</b>	1
<b>Author(s) Name:</b>	Karen Miller	<b>Designation:</b>	Head of Resourcing
<b>Date submitted:</b>	October 2020		

<b>Reason for producing the document</b>	To attract, recruit and retain a high quality workforce the Trust will consider paying relocation expenses as outlined in this policy. Offering assistance in relocation subject to the eligibility criteria is aimed at attracting and supporting new employees in their move to the area. The policy sets out the Trust’s approach to the payment of relocation and related expenses, including eligibility, entitlements, and processes to be followed.
<b>References used in document production</b>	HMRC Guidance: Expenses and benefits: relocation costs <a href="https://www.gov.uk/expenses-and-benefits-relocation">https://www.gov.uk/expenses-and-benefits-relocation</a>  <a href="https://www.westmidlandsdeanery.nhs.uk/support/removal-and-expenses-guidance">https://www.westmidlandsdeanery.nhs.uk/support/removal-and-expenses-guidance</a>  HR.14 Recruitment and Selection Policy
<b>List of contributors</b> <i>Detail name(s) and</i>	

<i>designation of contributors or those consulted</i>	
<b>Review of document prior to submission</b>  <i>Detail name(s) and designation</i>	HR Policy Subgroup  Howard Oddy, Director of Finance

### For Quality and Safety Use Only

Content checked <input checked="" type="checkbox"/>	Date Email sent to author/secretary to add to committee agenda 23/06/2021
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### For Committee Use Only

On agenda for Meeting on: 25/05/2021
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### Meeting Outcome

#### Document for Approval: JNCC May 2021

Approved <input checked="" type="checkbox"/>	Committee Document Number assigned ( <i>item number from Minutes</i> ): JNCC/07/05.21  Returned to Author by e-mail on n/a
Not approved <input type="checkbox"/>	Feedback to author:                      Sent by e-mail: <a href="#">Click here to enter a date.</a>

#### Document for Ratification: Policy Review Group 02/07/2021

Ratified <input checked="" type="checkbox"/>	Committee Document Number assigned ( <i>item number from Minutes</i> ): 6  Returned to Author by e-mail on <a href="#">Click here to enter a date.</a>
Not Ratified <input type="checkbox"/>	Feedback to author:                      Sent by e-mail: <a href="#">Click here to enter a date.</a>

<b>Document for Noting:</b>	Noted <input type="checkbox"/> No further action
<b>Committee Comments:</b>	

### For Policies only – to go to Policy Team

Final version Word document, Cover Document and minutes to be sent to Policy Team ([policy@wvt.nhs.uk](mailto:policy@wvt.nhs.uk))

## DOCUMENT HISTORY

Issue Status e.g. Draft or Final	Catalogue and Version Number	Document Title	Date	Actioned by: (Job Title)	Page/ Section/ Paragraph	Comments
Draft	V0.1	Relocation Policy	15.01.20	Head of Resourcing	All	New draft WVT policy developed to replace previously withdrawn HHT Personnel Policies No. 6 (Medical and Dental Staff Removal Expenses Policy) and No. 7 (Policy on Removal Expenses).
Draft	V0.2	Relocation Policy	23.09.20	Head of Resourcing	All	Amendments made following discussion at HR policy subgroup in August 2020
Draft	V0.3	Relocation Policy	28.10.20	Head of Resourcing	Sections 6 and 14	Amendments made to section 6: Eligibility for relocation assistance and section 14: Monitoring compliance following discussion at HR policy subgroup on 28/10/20
Draft	V0.4	Relocation Policy	4.12.20	Head of Resourcing	Sections 6 and 7	Eligibility criteria amended.
Final	V0.5	Relocation Policy	20.03.21	Head of HR	Section 7	Amendment to procedure to introduce sequence of authorisation points.

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## 1 SCOPE

This policy applies to all prospective employees who need to move house in order to take up a new post.

This policy does not apply to Junior Medical and Dental Trainees, in training grades, whose relocation is funded by the West Midlands Deanery.

## 2 INTRODUCTION

The Trust aims to recruit and retain a high quality workforce and to this end will consider paying relocation expenses as outlined in this policy. The offer of assistance in relocation (subject to the eligibility criteria in Section 6 below) is aimed at attracting and supporting prospective employees in their move to the area. The policy sets out the Trust's approach to the payment of relocation and related expenses, including eligibility, entitlements, and processes to be followed.

All payments made under this policy are discretionary; there is no automatic entitlement to relocation assistance from the Trust.

## 3 STATEMENT OF PURPOSE

The Trust is committed to equality of opportunity in employment and the recruitment of a diverse workforce regardless of race, age, disability, gender, religion/belief, sexual orientation, marriage/civil partnership or pregnancy/maternity.

The Trust will provide payment or part payment of legitimate expenses incurred by an employee who has to move house to take up a post, which is new to them, within the Trust, in line with the eligibility criteria in Section 6.

This policy complies with HM Revenue & Customs (HRMC) rules relating to relocation expenses and seeks to ensure that any payments made can be justified as providing value for money and result in a benefit for Wye Valley NHS Trust and for patients who receive care from the Trust.

Relocation expenses reimbursed by the Trust will be subject to payment if the employee leaves within 24 months of their start date.

Where discretion is used in the reimbursement of relocation costs, matters will be referred to the Director of Finance and the Director of HR to enable decisions to be taken equitably and in accordance with the Trust's Equality & Diversity Policy (HR.08).

## 4 DEFINITIONS

**HRMC:** Her Majesty's Revenue and Customs, the government's tax, payments and customs authority.

**Relocation expenses** are a sum of money that an organisation pays to someone who moves to a new area in order to work for the organisation; the money is to help them pay for moving house.

## **5 DUTIES**

### **5.1 Director of Finance**

The Director of Finance has overall responsibility for administering and monitoring this policy.

### **5.2 Executive Directors**

Executive Directors must ensure that the requirements of this policy are met in all instances in which relocation expenses are offered and paid.

### **5.3 Appointing Managers**

Appointing manager must:

- Have approval, from the relevant Executive Director, that relocation assistance may be offered in advance of any recruitment process
- Discuss and agree with the relevant Divisional Financial Accountant any proposed offer/agreement to pay relocation expenses.
- Ensure any agreement or relocation expense claim meets the requirements of this policy.

## **6 ELIGIBILITY FOR RELOCATION ASSISTANCE**

Eligibility for assistance is determined by the nature of the role appointed to, the distance of the main residence from the base for the new role and the time taken to make the move. However, relocation/removal expenses are only available to employees on Agenda for Change Terms and Conditions of Service Band 7 and above or posts deemed hard to recruit to, on the agreement of the Director of HR & OD & Director of Finance, following approval at the weekly Executive meeting.

There is no automatic right for relocation/removal expenses.

## **7 PROCEDURE**

### Pre-advertising of Post

Where a recruiting manager considers relocation assistance is required, relocation assistance for eligible candidates must be requested via the vacancy review form, to be signed off by Finance Director or the Director of HR & OD following approval at the weekly Executive meeting.

### Prior to formal commitment for Relocation Assistance

Request for relocation assistance should be made and discussed at the time of offer of employment with the Trust.

The level of relocation assistance recommended by the recruiting manager must be submitted to the relevant Executive Director for final approval at the weekly Executive meeting.

Confirmation of the agreed relocation package and the amount of allowance eligible for claim must be detailed on the approval to appoint form, signed by the relevant member of the Executive.

The agreed relocation package will be detailed in the formal conditional offer of employment.

There is an expectation that relocation assistance will be available for a period of 12 months from date of commencement in post.

### Acceptance of Relocation Assistance

The applicant should acknowledge acceptance of the offer by signing and returning the reimbursement claim form in Appendix 1 to the Divisional Manager, retaining a copy for their own records.

Original receipts should be submitted by the new employee to the Divisional Manager along with the claim form (see Appendix 1) and once received Payroll will be requested to make a payment to the individual against the receipts received.

Reimbursements will be made in no more than four instalments and records of claims will be kept in the individual's personal file. Proof of completion of the relocation should be supplied with the last claim for expenses and should be:

- a solicitor's letter if a house is being purchased;
- or a copy of the tenancy agreement if a property is to be rented

Copies of receipts should be retained within the employee's personal file held by payroll/recruitment/line manager; as such evidence may be required by the Inland Revenue.

## **8 ASSISTANCE AVAILABLE**

Relocation may be used for any of the following up to the agreed maximum:

- Legal fees on sale, purchase (including stamp duty) or rental
- Estate agents fees on sale (normally the lowest of three estimates)
- Survey fee on purchase
- Cost of physical removals and or storage of furniture (normally the lowest of 3 quotations)
- Cost of travel and one weekend accommodation for family to view the area
- Cost of interim local accommodation, for the employee only, for up to 3 months pending move
- Rent for accommodation up to the agreed amount or 3 months duration whichever is the lesser amount
- Rental referencing fees

In certain circumstances it may be appropriate to offer travelling expenses for relocation of posts of more than 75 miles for a period of no longer than 6 months, subject to the current appropriate tax rate. The expenses will relate to the difference between the mileage from home to the previous place of work and the mileage from home to the new place of work. The expenses will be reimbursed at the equivalent of the public transport rate, up to an agreed amount.

Any of the above assistance will apply to relocations within the UK only, or from the UK port of entry.

The Trust will not reimburse items of a capital nature (e.g. building work or improvements to the property) nor will it reimburse repairs to, or replacement of, fixtures or fittings or garden items including fences, sheds or walls.

All financial expenses relating to the employee's move are the responsibility of the employee and it is for the employee to ensure that they have sufficient funds to meet these expenses.

The Trust will only reimburse eligible expenses incurred, subject to the production of original receipts. Reimbursement will not be made on quotations, estimates or un-receipted claims.

The Trust will not make payments direct to suppliers: any payments from the Trust will be made directly to the employee and it will be the employee's responsibility to settle invoices. Payment will be made by the Trust to the employee as soon as possible after the authorisation of the claim.

Claims for expenses in connection with the removal of effects must be made within 3 months of the incurring authorised expenditure.

### **Receipts**

The Trust reserves the right to withhold reimbursement of expenses if receipts are not produced as evidence of expenditure.

It is the responsibility of the recipient to keep copies of receipts for expenses incurred in respect of relocation in case of inspection by the Inland Revenue, and the Trust will retain originals of such receipts.

Payments will only be made to staff once they have commenced employment with the Trust.

## **9 REPAYMENT OF RELOCATION ALLOWANCES**

Relocation assistance is offered subject to the agreement that should the employee leave the post within two years (24 months) of appointment for reasons other than redundancy, redeployment or TUPE transfer, repayment will be requested as follows:

<b>Period of service (from date of appointment)</b>	<b>Amount to be repaid (as a percentage of total expenses)</b>
0 – 6 months	100%
6 – 12 months	75%
12 – 18 months	50%
18 – 24 months	25% (for each completed month up to 24 months)

The employees will be required to sign an undertaking (Appendix 1) that in the event of them leaving the employment of Wye Valley NHS Trust within 2 years from the date of taking up the

appointment; a proportion of the total expenses reimbursed will be payable to the Trust, based on the table above. This payment will be deducted from the employee's final salary in full.

The Trust reserves the right to extend the period of employment which qualifies for repayment terms in some circumstances.

On receipt of notice of termination the manager should establish whether relocation payments have been made and agree a repayment schedule with the employee. This should be noted on the termination form sent to the payroll department so that payroll may be alerted to the repayments schedule during the notice period.

The manager would record exactly whether expenses were paid and the payroll team can then establish which percentage applies based on employment start date. Recovery of outstanding monies owing would be taken out of the staff member's final pay, anything not recoverable at this time will be sent out as an invoice to the leaver. Should this occur, the Trust Debtor will write to the employee and ask for full repayment; at this point there may be opportunity to negotiate a repayment plan.

The Trust reserves the right to reclaim payments made to employees who fail to relocate within two years of their appointment date.

### **Submission Date**

Please note that the cut-off date for receiving forms requiring action within the same month to pay is the 1<sup>st</sup> - 2<sup>nd</sup> of the month. It is however, best practice to submit forms by the cut off and four weeks in advance of the effective date.

Any forms received after this may not be processed in time for pay day and could lead to overpayments/underpayments. If you are worried that the form has been submitted late and is pay affecting please contact the Payroll Manager/team for advice.

### **Tax Implications**

Reimbursement of removal costs may be claimed to a maximum of **£8,000**. This limit shall be applied to all Trust employees who qualify for assistance under this policy.

According to HM Revenue & Customs (HMRC) 'if your employer helps you to move home because of your job, any payments you receive, or any goods or services provided for you, are treated as part of your earnings for tax and national insurance contribution (NICs) purposes. However, the first £8,000 of any help you get from your employer is exempt from tax and NICs as long as certain conditions are met'. You are strongly advised to view the HMRC Relocation Guidance <https://www.gov.uk/expenses-and-benefits-relocation>

Any payment in respect of removal expenses must be included on the individual's end of year tax return.

## **10 EXCLUSIONS**

Relocation expenses will not be payable to any member of staff (other than junior medical staff) taking up a post on a temporary contract for a year or less. For temporary contracts between one and two years, limited expenses may be payable. Temporary posts of more than two years will be treated in the same way as substantive posts.

Relocation expenses will not be paid where an employee's partner is also receiving support from their employer. The employee must notify the Trust if a partner/spouse is eligible to claim financial assistance towards relocation (NB this applies to spouse/partners who are both within

the NHS and outside of the NHS). At the discretion of the Trust, employees may still be granted reduced financial assistance but cannot claim twice for the same expense. Employees need to be aware that claiming twice will be considered as fraud and will be referred to the NHS Counter Fraud Service to investigate and the employee may face disciplinary action.

## 11 MEDICAL TRAINING GRADE DOCTORS

Medical training grade doctors have guidelines issued by the West Midlands Deanery. The aim of these guidelines are to provide assistance to training grade medical and dental staff that are required to move home in order to take up a post on a training programme. These guidelines can be found at <https://www.westmidlandsdeanery.nhs.uk/support/removal-and-expenses-guidance>.

## 12 RIGHT TO APPEAL

Employees who feel that they have been unfairly treated in relation to financial assistance for the purposes of relocation provisions may pursue this matter as a grievance in line with the Trust's grievance procedure.

## 13 TRAINING

There is no training associated with policy.

## 14 MONITORING COMPLIANCE WITH THIS DOCUMENT

The table below outlines the Trust's monitoring arrangements for this document.

<b>Aspect of compliance or effectiveness being monitored</b>	<b>Monitoring Method</b>	<b>Individual responsible for the monitoring</b>	<b>Frequency of the monitoring activity</b>	<b>Group/ committee which will receive the findings / monitoring report</b>	<b>Group / committee / individual responsible for ensuring that the actions are completed</b>
Posts attracting relocation expenses meet the eligibility criteria set out in the policy	HRBPs and recruitment via the recruitment tracker	Line manager	Monthly	Data team and finance	Divisional F&P General Managers
Demographics of staff receiving relocation expenses	HRBPs and recruitment via the recruitment tracker	Data team reporting and HRBPs	Monthly	Data team and finance	Divisional F&P General Managers
Repayment of relocation expenses for staff leaving the Trust	Line managers in the divisions and HRBPs for their	Line managers in the divisions and HRBPs for their specific divisions	Monthly	Data team and finance	Divisional F&P General Managers

within 2 years of joining the Trust.	specific divisions				
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## 15 REFERENCES/BIBLIOGRAPHY

Government guidance on: Expenses and benefits: relocation costs

<https://www.gov.uk/expenses-and-benefits-relocation>

<https://www.westmidlandsdeanery.nhs.uk/support/removal-and-expenses-guidance>

## 16 RELATED TRUST POLICIES / PROCEDURES

HR.14 Recruitment & Selection Policy and Guidance

## 17 EQUALITY IMPACT ASSESSMENT

### Section 1

<b>Name of Lead for Activity:</b>	Karen Miller
<b>Job Title:</b>	Head of Resourcing

Details of individuals completing this assessment	Name	Job Title	Email Contact
	Karen Miller	Head of Resourcing	Karen.miller@wvt.nhs.uk
<b>Date assessment completed</b>	29 June 2020		

### Section 2

Activity being assessed (e.g. policy/procedure, document, service redesign, policy, strategy etc.)	<b>Title: Relocation Policy</b>		
What is the aim, purpose and/or intended outcomes of this Activity?	<p>The policy sets out the Trust's approach to all newly appointed substantive staff employed by the Trust and existing staff who are required to relocate due to a Trust initiated change of work base.</p> <p>This policy does not apply to Junior Medical and Dental Trainees, in training grades, whose relocation is funded by the West Midlands Deanery.</p>		
Who will be affected by the development & implementation of this activity?	<input type="checkbox"/> Service User <input type="checkbox"/> Patient <input type="checkbox"/> Carers	<input checked="" type="checkbox"/> Staff <input type="checkbox"/> Communities <input type="checkbox"/>	

	<input type="checkbox"/>	Visitors	<input type="checkbox"/>	Other
Is this:	<input checked="" type="checkbox"/> Review of an existing activity <input type="checkbox"/> New activity <input type="checkbox"/> Planning to withdraw or reduce a service, activity or presence?			
What information and evidence have you reviewed to help inform this assessment? (Please name sources, e.g. demographic information for patients / services / staff groups affected, complaints etc.)	Previous policy, good practise, HMRC Relocation Guidance, West Midlands Deanery, other Trusts in the region.			
Summary of engagement or consultation undertaken (e.g. who, and how, have you engaged with, or why do you believe this is not required)	Engaged with recruiting managers, policies from neighbouring trusts, and up to date HRMC legislation.			
Summary of relevant findings	These are reflected in the policy.			

### Section 3

Please consider the potential impact of this activity (during development & implementation) on each of the equality groups outlined below. **Please tick one or more impact box below for each Equality Group and explain your rationale.** Please note it is possible for the potential impact to be both positive and negative within the same equality group and this should be recorded. Remember to consider the impact on e.g. staff, public, patients, carers etc. in these equality groups.

Equality Group	Potential positive impact	Potential neutral impact	Potential negative impact	Please explain your reasons for any potential positive, neutral or negative impact identified
<b>Age</b>		√		This policy is consistent in its approach to relocation expenses regardless of age
<b>Disability</b>	√		√	Recognition that there may be higher costs for moving disabled employees which should be considered on a case by case basis in accordance with the duty to consider reasonable adjustments.
<b>Gender Reassignment</b>		√		This policy is consistent in its approach to relocation expenses regardless of the employee's gender reassignment status.
<b>Marriage &amp; Civil Partnerships</b>		√		This policy is consistent in its approach to relocation expenses regardless of the employee's marriage or civil partnership.
<b>Pregnancy &amp; Maternity</b>		√		This policy is consistent in its approach to relocation expenses regardless of the employee's pregnancy or maternity status
<b>Race including Travelling Communities</b>		√		This policy is consistent in its approach to relocation expenses regardless of the

<b>Equality Group</b>	<b>Potential positive impact</b>	<b>Potential neutral impact</b>	<b>Potential negative impact</b>	<b>Please explain your reasons for any potential positive, neutral or negative impact identified</b>
				employee's race, including the travelling communities.
<b>Religion &amp; Belief</b>		√		This policy is consistent in its approach to relocation expenses regardless of the employee's religion or belief.
<b>Sex</b>		√		This policy is consistent in its approach to relocation expenses regardless of the employee's sex.
<b>Sexual Orientation</b>		√		This policy is consistent in its approach to relocation expenses regardless of the employee's sexual orientation.
<b>Other Vulnerable and Disadvantaged Groups</b> (e.g. carers; care leavers; homeless; Social/Economic deprivation, travelling communities etc.)	√		√	Recognition of carer's responsibilities and impact of moving.
<b>Health Inequalities</b> (any preventable, unfair & unjust differences in health status between groups, populations or individuals that arise from the unequal distribution of social, environmental & economic conditions within societies)		√		This policy is supportive in encouraging open and fair discussions on relocation/moving expenses.

#### Section 4

<b>What actions will you take to mitigate any potential negative impacts?</b>			
<b>Risk identified</b>	<b>Actions required to reduce / eliminate negative impact</b>	<b>Who will lead on the action?</b>	<b>Time frame</b>
Role performance & disability	Awareness of an individual's disability by line manager and recognising that disabled employees should be considered on a case by case basis in accordance with the duty to consider reasonable adjustments.	Line Manager	On-going
Role performance & carer's responsibility	Awareness of an individual's carer's responsibility and by the line manager/supported through flexible working policy.	Line Manager	On-going

<b>How will you monitor these actions?</b>
<b>Line manager will monitor these actions</b>

<b>When will you review this EIA?</b> (e.g. in a service redesign, this EIA should be revisited regularly throughout the design & implementation)
EIA to be reviewed as and when policy is reviewed

## Section 5

Please read and agree to the following Equality Statement

### Equality Statement

- 1.1. All public bodies have a statutory duty under the Equality Act 2010 to set out arrangements to assess and consult on how their policies and functions impact on the 9 protected characteristics: Age; Disability; Gender Reassignment; Marriage & Civil Partnership; Pregnancy & Maternity; Race; Religion & Belief; Sex; Sexual Orientation
- 1.2. WVT will challenge discrimination, promote equality, respect human rights, and aims to design and implement services, policies and measures that meet the diverse needs of our service, and population, ensuring that none are placed at a disadvantage over others.
- 1.3. All staff are expected to deliver services and provide services and care in a manner which respects the individuality of service users, patients, carers etc. and as such treat them and members of the workforce respectfully, paying due regard to the 9 protected characteristics

<b>Signature of person completing EIA:</b>	Karen Miller
<b>Date signed:</b>	29/06/2020
<b>Comments:</b>	
<b>Signature of Lead for this activity:</b>	Karen Miller
<b>Date signed:</b>	29/06/2020
<b>Comments:</b>	

## APPENDIX 1: RELOCATION EXPENSES – REIMBURSEMENT CLAIM FORM

In consideration of my reimbursed removal expenses in accordance with the terms and conditions of my appointment, I hereby undertake that I will:

- Relocate within a 12 month period from date of commencement in post
- Will remain in the employment of Wye Valley NHS Trust for a period of two years the duration from the date of commencement in the post which had led to my being offered payment of relocation expenses.

I agree that if I break this undertaking, or in the event of the Trust terminating my employment for any reason, I will, if required to do so, repay a proportion of the expenses received based on the table shown in the Relocation Policy (section 9: Repayment of Relocation Allowances) and I agree to such money being deducted from my salary or any final payment.

I declare that neither myself, my spouse or partner, or any member of my household will receive assistance with relocation expenses from any other source in respect of the relocation.

I accept the Trust may periodically review the efforts taken by me to relocate to the new area and according to the circumstance I agree that repayment of expenses reimbursed in anticipation of any relocation the removal expenses may be required if relocation does not proceed.

I hereby declare that the information and costs incurred given by me in this form are correct in all details. I have attached all receipts and any associated costs documentation for each claim to this form.

Full Name:	
Job Title:	
Department / Area:	
Dated:	

### Personal Details

Assignment Number	
Department	
Base	
Contact Number	
Address of proposed new permanent accommodation	

Please indicate which type of expenses you wish to claim:

	Please tick as applicable ✓
a) Sell and purchase property (from owner occupier to owner occupier)	
b) Rent a property (from rented to rented accommodation – includes removal and legal costs)	
c) Removal costs (for first time buyers)	

Reimbursement of removal costs may be claimed to a maximum of **£8,000**. This limit shall be applied to all Trust employees who qualify for assistance under the Relocation Policy.

From the table below please indicate the amount to claim and complete dates as appropriate. Receipts for each claim must be attached to this form.

Expenditure item	Amount
Legal fees on sale, purchase or rental	Amount £
Cost of removal of furniture and effects (normally the lowest of 3 quotations)	Date of removal: Amount £
Charges where, of necessity, furniture or effects are placed in temporary storage pending the imminent purchase of new property.	Date placed in temporary storage: Amount £
Estate agent fees on sale (normally the lowest of 3 quotations)	Date of sale completion: Amount £
Survey fees on property to be purchased	Date of survey: Amount £
Cost of travel and one weekend accommodation for family to view area	Amount £
Cost of interim local accommodation, for the <b>employee only</b> , for up to 3 months pending move	Amount £
Rent for accommodation up to the agreed amount or 3 months duration whichever is the lesser amount	Amount £
Rent referencing fees	Amount £

<b>Total Amount to be claimed</b>	<b>Amount £</b>
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<b>To be completed by the Authorising Signatory of the Division</b>	
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<b>Appointing Manager Name:</b>	<b>Appointing Manager Signature:</b>
---------------------------------	--------------------------------------

<b>Line Manager Name:</b>	<b>Line Manager Signature:</b>
<b>Line Manager Job Title:</b>	

<b>Line Manager Contact Number and Email:</b>
Telephone:
Email:

<b>Division/ department &amp; cost centre code:</b>	
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<b>Date:</b>	
--------------	--

<b>To be completed by employee</b>	
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**Employee Agreement: (please read)**

I agree to check my payslip after the effective date of this appointment form to check my pay is correct and has been updated in line with the conditions set out above. I understand that it is my responsibility to report any anomalies to the Payroll Department (01432 383386) or email: [PayrollEnquiriesWVT@wvt.nhs.uk](mailto:PayrollEnquiriesWVT@wvt.nhs.uk) and my line manager immediately. I understand that any overpayments will be recovered in line with Trust Policy.

<b>Employee Name: (Please print)</b>	
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<b>Employee Signature:</b>	
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<b>Date:</b>	
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<b>To be completed by Executive Director of Finance</b>	
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I certify that the above expenses are payable by the Trust and should be charged to:

Cost centre code:

<b>Director of Finance Name:</b>	
----------------------------------	--

<b>Signature:</b>	
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<b>Date:</b>	
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