Relocation Policy

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Relocation
Policy

1 Purpose
In support of our strategic goal to attract, recruit and retain the best available talent from around the world, the University offers a relocation package to support new employees who are required to relocate in order to take up employment at the University. The relocation package is offered as a contribution towards costs incurred, and is designed to be flexible, allowing staff to use the financial support available (as outlined in this Policy) in the way that will be most helpful to them.

2 Scope
New employees to the University will qualify for relocation assistance if they meet the eligibility criteria which will normally be as follows:

- all staff being appointed on continuing contracts, or fixed term contracts of over three years duration; and
- where new staff currently live outside of what is a reasonable travelling distance to the University, (for guidance purposes this would normally be more than 50 miles from the University) and move within 30 miles of the University, with the new home becoming their main place of residence.

3 Conditions
The following qualifying conditions will apply:

- employment would normally need to have commenced before any claim is paid;
- claims should normally be made within twelve months of the member of staff taking up the appointment. This may be extended in exceptional circumstances, with the approval of the Executive Dean/Director and HR Manager. However the maximum time limit for claims to be made should be in accordance with the HM Revenue and Customs rules for the exemption of tax and national insurance liability, i.e. before the end of the tax year following that in which the employee takes up the new appointment;
- there is only one relocation claim permitted per household, e.g. if a husband and wife, or partners at the same address, are both to be employed at the University, only one member of staff can make a claim for reimbursement from the University;
- eligible staff will be offered, in writing, a relocation package under the terms of this Policy and will be asked to sign to confirm their acceptance of these terms.

4 Financial Support for Relocation
A financial contribution towards the costs of relocation will normally be provided to members of staff as follows:

- Financial support can be claimed up to 10% of starting salary, to a maximum of £8,000.
- For those relocating from outwith the UK a further allowance of up to £2,000 may be available on request, where individual circumstances mean additional expenditure is incurred.

4.1 Special Cases for Assistance
Staff employed and funded on fixed term contracts of three years duration or under, for specific projects or pieces of work, will not be eligible to apply for the full relocation package but can apply to HR for a contribution of up to £350 to assist with their relocation costs.
5 The Relocation Claims Process

Any request for payment of expenses should be submitted via the University’s Finance Management System, which can be accessed via Pegasus. Once submitted, this will be routed to Human Resources for approval before payment is made directly to your bank account. A guidance note is attached for information.

Members of staff will require to pay any relocation amount themselves in the first instance and then submit their relocation expenses claim for reimbursement under the terms of this Policy. Direct payment to companies such as removal firms or storage companies will not be made by the University. Scanned copies of receipts must be uploaded with the expenses claim to allow the claim to be paid. (Credit card receipts or bank statements are not permitted.)

The Finance Management System will convert any international currency claim for expenses converted to Sterling using the European Central Bank exchange rate on the last working day of the month in which the expense was incurred.

6 Relocation Expenses

6.1 What can be claimed for

Guidance on what types of items can be claimed for reimbursement is detailed below. Within the headings below, individual may choose how they use the financial support available according to their particular needs. However all claims are subject to an overall limit as defined at section 4 above. All reimbursement is made on the basis of actual costs incurred.

6.1.1 Removal costs

The packaging and removal of furniture and effects including insurance of goods in transit. Two competitive quotes should be submitted. Unless otherwise agreed it is expected that the company with the lowest quote will be used. If a removal company is not used, reasonable expenses for the van hire, petrol and insurance costs can be claimed. Only sea freight will be paid for moves into the UK.

The costs of temporary storage of personal effects, where a permanent move cannot be made immediately.

Travel costs for preliminary search visit to the area.

Economy travel and overnight accommodation for two nights is permitted (for moves within the UK only) for a preliminary visit to the area by the prospective member of staff and one companion.

6.1.2 Temporary Accommodation

If new accommodation cannot immediately be purchased then temporary accommodation costs will be paid up to a maximum of 6 months. The cost of this temporary accommodation will be met from the overall contribution sum agreed for the relocation. A copy of the rental agreement will be required.

6.1.3 Travel costs if relocating from within the UK

For staff relocating from within the UK, the cost of relocating to the new area will be paid at either one economy class or equivalent air or train fare for the member of staff, spouse/partner and children; or if moving by car, appropriate mileage (based on the University’s mileage rate) can be claimed.

6.1.4 Travel costs if relocating from overseas

For staff relocating from overseas to take up post, one economy class or equivalent air fare for the member of staff, spouse/partner and children will be paid to port of entry to the UK. Airfare in excess of economy level will not be reimbursed.
6.1.5 Professional and Legal costs – Sale of Property
Reasonable legal expenses and associated costs along with estate agents costs in connection with the sale of the former home will be reimbursed.

6.1.6 Professional and Legal costs – Purchase of Property
Reasonable legal expenses and associated costs in connection with the purchase of the new home will be reimbursed, as will survey/valuation costs and stamp duty (to the value of the property being sold).

6.1.7 Visa Costs
Where the individual incurs immigration visa fees for themselves and/or their dependants, these maybe included in the claim (N.B. the University does not provide financial assistance in respect of subsequent visa extension processes that may later occur).

6.2 Tax Implications
The first £8,000 of qualifying removal expenses and benefits is exempt from tax and NIC’s, if the move is completed in line with the qualifying conditions of the HM Revenue and Customs. Any qualifying expenses in excess of £8,000 will be treated as a benefit in kind and tax and NIC’s will be liable to be paid by the member of staff.

Full information on the tax treatment of relocation benefits is available from the UK Government website, which can be viewed here.

6.3 Retaining a Main Residence Elsewhere
It is recognised that for various reasons some individuals will choose not to permanently relocate but elect to retain their family home elsewhere and travel to and from the University on a weekly basis i.e. Monday to Friday. In these circumstances, and at the University’s discretion, where an individual chooses to rent a property locally, the rental costs for the first 6 months will be paid. A copy of the rental agreement will be required. Where this situation arises, an individual will also be able to claim for the cost of public transport or petrol costs for the first 12 months to cover travel to and from the University.

In addition to the above the following may be requested:

- Travel costs for preliminary search visit to the area
- Economy travel and overnight accommodation for two nights is permitted for a preliminary visit to the area by the prospective member of staff and one companion

It should be noted that whilst these expenses can be reimbursed, they do not attract the relocation exemption and will therefore be treated as a benefit in kind. This means that tax and national insurance contributions will be liable to be paid by the member of staff and any such expenses will be routed by FMS to payroll for reimbursement.
7 **Recovery of Relocation Payments**
The University reimburses relocation expenses on the condition that the recipient does not choose to leave the University’s employment within three years. If the recipient does leave within three years the University will recover payments reimbursed on the following basis:

<table>
<thead>
<tr>
<th>Leaving in</th>
<th>Payment recovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within one year of appointment</td>
<td>100% of payments</td>
</tr>
<tr>
<td>Within two years but more than 1 year of appointment</td>
<td>67% of payments</td>
</tr>
<tr>
<td>Within three years but more than 2 years of appointment</td>
<td>33% of payments</td>
</tr>
</tbody>
</table>

Any monies owed at the member of staff’s date of leaving will be deducted from their final salary.

The recipient will be asked to sign to agree to these terms as per the template letter outlined in Appendix A.

8 **Questions on the Relocation Policy**
Any questions on the application of this Relocation Policy can be discussed with Human Resources.
# Appendix A: Outline Letter of Acceptance

## A. Personal/Location details

<table>
<thead>
<tr>
<th>Name:</th>
<th>Title</th>
<th>Post/Department:</th>
<th>Start Date</th>
<th>Former Address:</th>
<th>Present Address:</th>
<th>Relocation Support:</th>
</tr>
</thead>
</table>

I, the above named, confirm that I have read and understand the University’s Relocation Policy and accept the relocation expenses financial support offered to me under the terms of the Policy. I confirm that if I leave the University’s employment within 3 years of appointment I will repay to the University on demand, in line with the Policy Section 6, the expenses paid to me. I agree to the deduction by the University of any outstanding sums due by me to it, including relocation expenses from my final salary payment.

Signature:

Date:
Relocation Claims – Guidance and Screenshots

To reclaim relocation costs, follow the same process as reclaiming expenses through the Finance Management System (FMS). Guidance on claiming expenses via FMS can be found here. It’s very easy to follow but noted below is a quick guide detailing what you need to do. Also included at the end of this document are some screenshots for ease of reference.

* Check in the first instance that you have access to FMS - you can do this by trying to login via Pegasus - click the Finance tab and then choose Finance Management System (FMS). If you are denied access, then you must arrange this with your Department/School/Directorate or confirm whether a proxy has been set up to input the claim on your behalf;

* Scan a copy of your receipts and save them on to your PC as you’ll need to upload these as part of the expenses claim;

* On the first page of the FMS claim form it asks you to input details of the purpose of the claim - type ‘Relocation Costs’ then click the box Next Step (screenshot 1 below) (NB. Do not click SAVE when moving through the process as this will actually submit your claim);

* You will now be on tab 2 Expenses (screenshot 2). Click ‘Add’ and a drop-down list will appear under ‘Expenses Detail’s, select the appropriate expense type from the list (screenshot 3). Note that some expenses may be taxable and if you are unsure whether your expense is taxable, please refer to clauses 6.2 and 6.3 of the Relocation Policy. In the section ‘GL Analysis’ you will be asked for a sub project code, which is HR’s relocation budget: sub code GEN1565-110. Click Next Step;

* You will now be on tab 3 Summary (screenshot 4). On the top right hand side of the screen there is a paperclip. Click the paperclip and this will allow you to upload the scanned copy of the receipts to support your claim either as a single pdf or multiple documents. Change the status to Ready in the drop down menu once you have uploaded the receipts;

* Now click SAVE and that is the claim submitted. The claim will be routed directly to HR for approval and then payment will be made directly to your bank account.
Screenshot 1: General: Select the tab ‘Time and Expenses’ and from there select ‘Expenses’, which will lead you to this page:
Screenshot 2: Click ‘Add’ to enter each line of your expenses claim and select the appropriate expense type from the drop down menu.

**NB.** If you are unsure whether your expense is taxable, please refer to clauses 6.2 and 6.3 of the [Relocation Policy](#).
Enter the relocation claim details for each expense and enter sub project GEN1565-110.

**NB.** If the overall total of the expenses incurred by you exceeds the amount of relocation allowance granted, please limit the total amount of your claim to that of your relocation allowance granted.
Screenshot 4: Upload your scanned copy receipts, change the Status to Ready and submit the claim by clicking ‘Save’

**NB.** If you receive this message that the funds check has failed, just click Yes