

Policy On Removal And Related Expenses

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Authored by:	
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NEWHAM HEALTHCARE NHS TRUST

POLICY ON REMOVAL AND RELATED EXPENSES

• SCOPE

1.1 This policy covers all permanent employees of the Newham Healthcare NHS Trust (hereinafter referred to as the Trust) or those employed on a fixed term of 2 years or more including Doctors on rotation, irrespective of the employee's grade, marital status, whether the post is full-time or part-time and whether or not the employee is currently working within the NHS.

- The provisions only apply upon first appointment to a post within the Trust subject to the employee having received approval within three months of commencing employment and the employee signing and undertaking to confirm they will remain in the post for 2 years.

2. ELIGIBILITY

2.1 The Trust has defined a geographical area which is considered within reasonable living distance of the Trust and so long as an employee moves from outside to within this geographical area, removal and related expenses will be reimbursed provided all the other criteria laid down in this agreement are adhered to.

2.2 The geographical area for all staff other than those identified at appointment as having an on call commitment is defined as a 20 mile radius from Newham General Hospital, Glen Road, Plaistow. For those with an on call commitment e.g. Consultants the geographical area is 10 miles from their base, any variation to this may only be made with the prior agreement of the Service Manager/ Clinical Director and the Director of Human Resources.

3. ALLOWANCES CLAIMABLE

3.1 The expenses detailed below will be reimbursed subject to the conditions set out and the limit detailed in paragraph 3.8.

3.2 Search for Accommodation – The cost of travel and subsistence will be reimbursed up to a maximum of the General Whitley rates (for up to 2 visits in total) to the new area to search for accommodation and up to a maximum of 4 nights subject to the production of relevant receipts.

3.3 Reasonable legal and other expenses incurred due to the sale of the property.

3.4 Reasonable legal expenses associated with the purchase of a new property subject to a reduction of "betterment" (including bona fide unsuccessful attempt to purchase).

3.5 Betterment is defined as when the type and standard of the property purchased is clearly better than that sold, e.g., selling a one bedroom flat and purchasing a 3 bedroom house.

3.6 In deciding the percentage of betterment the Payroll Manager will contact an Estate Agent in the area of the newly purchased property and determine how much the old property would have sold for had it been in a new area. The percentage difference between the sale and the purchase price determined as above will be applied to the purchasing expenses which will be reduced accordingly.

3.7 Removal and Storage

- Removal of furniture and effects including insurance
(The least of three quotes)
- Storage of furniture and effects for up to six months.

3.8 When totalling the claims in 3.3, 3.4 and 3.7 above the maximum reimbursement possible to the employee will be £5,000.

4 METHOD OF APPROVING APPLICATIONS FOR REMOVAL AND RELATED EXPENSES.

4.1 Appointing officers are responsible for recommending whether an application for Removal and Related expenses is in accordance with the terms and conditions of service and the criteria given above.

4.2 The Human Resources Department are responsible for authorising that any claim is within the terms and conditions of service and the policy.

4.3 The Payroll Manager is responsible for the correct payment and auditing of removal expenses paid.

5 GRIEVANCE

5.1 Any grievances relating to the application of this Policy shall be processed through the Trusts Grievance Procedure.

BN/LW/REMPOL.DOC
(Revised: 20 September 1996)

NEWHAM HEALTHCARE NHS TRUST

PROEDURE FOR APPLYING THE POLICY ON REMOVAL AND RELATED EXPENSES.

1 INTRODUCTION

1.1 The main requirements for assessing the eligibility for removal and associated expenses is fully detailed in the removal Policy.

1.2 The overriding criteria is that the employee's move is reasonable and necessary. The Trust's policy has defined reasonable as being a move by the employee living outside a geographical area of 20 miles radius from Trust Headquarters, Plaistow, to within that area or 10 miles radius from their base for those on call e.g. Consultants. A map of this approximate area is given in Appendix A.

1.3 When anyone moves house there is not only a considerable financial commitment involved but also acute anxiety and stress. It is important that, to ease both of these conditions, the correct procedure is followed in processing applications for expenses by appointing officers and that any problems are handled quickly and at a local level.

1.4 The aim of this guide is to provide a procedure for appointing officers to follow and in amplification to the current policy.

2 PROCEDURE PRIOR TO INTERVIEW

2.1 The appointing officer should consider, prior to interview, those candidates who will be eligible to apply. If there is any query at this stage the appointing officer should consult with the appropriate Human Resources Advisor.

3 PROCEDURE AT INTERVIEW

3.1 As a standard part of the interview process, the appointing officer should ask candidates if they intend to move should they be successful. In the case of candidates confirming they will be intending to move, then their eligibility or otherwise for removal and associated expenses should be discussed.

3.2 It is also important at this stage to ask applicants if they are already receiving certain benefits from their current NHS Employer e.g., car loans/ house loans. Appointing Officers must check with the Human Resources Department making undertakings to protect these benefits.

4 PROCEDURE FOLLOWING INTERVIEW

4.1 Once the successful applicant has been chosen the letter of offering the post should inform the person of their eligibility or otherwise for removal expenses and where they are eligible enclose the information sheet given at appendix B.

4.2 On the new employee's first day of employment the appointing officer should provide the application form for removal and associated expenses and explain:

4.2.1 That the employee must move within the geographical area specified by the policy.

4.2.2 That if the proposed purchase is considered a "betterment" then the employee will be reimbursed using the notional value of a comparable property to that from which they moved.

4.2.3 That before the employee enters into any financial commitment regarding the proposed move he/she must discuss the reasonableness of the move with the appointing officer and be advised at this stage to obtain proper quotes etc.

4.2.4 The procedure to be followed in making a claim.

5 PROCEDURE ON RECEIPT OF APPLICATION

5.1 On receipt of an application for removal and associated expenses, the appointing officer must ensure that the form has been completed correctly and the necessary receipts/ bills etc sustaining the claim are attached as require

APPENDIX B

NEWHAM HEALTHCARE TRUST

REMOVAL AND ASSOCIATED EXPENSES

At your recent interview it was explained that you are eligible to apply for removal and associated expenses. The Trust recognises that moving home and searching for new accommodation is both expensive and stressful, therefore, to ensure that any application you may make is processed as quickly as possible the following rules and procedures must be followed.

- a) You will be required to move to an area within a 20 mile radius of the Trust Headquarters, Plaistow or 10 miles radius from your base if you have an on call commitment e.g., Consultants.
- b) You must discuss with your appointing officer the reasonableness of your purchase before undertaking any financial commitments in respect of the purchase of the new property.
- c) You must read the Trust's Application for Removal and Associated Expenses Form carefully (this will be given to you on the first day of work) and ensure that you comply with all its requirements, especially in respect of getting quotations where applicable and providing bills/receipts/invoices as necessary. If you require a form prior to taking up post please let me know.

I enclose a copy of the policy which details the expenses to which you are entitled.

It is not necessary to detail all the costs of moving and purchase before applying for expenses to be paid, reimbursement may be sought as each element of expense is incurred. Therefore, the process of applying should be discussed fully with your appointing officer and, where appropriate, the Human Resources Advisor.

NEWHAM HEALTHCARE NHS TRUST

APPLICATION FOR ASSISTANCE WITH REMOVAL AND ASSOCIATED EXPENSES

Name of Applicant.....

PREVIOUS APPOINTMENT

Authority.....

Post.....

Based at/Department.....

Date of Termination.....

Accommodation.....

- Furnished/Unfurnished
- Owned/Rented Delete as applicable

PRESENT EMPLOYMENT

Post/Grade/Salary.....

Based at/Department.....

Date of Commencement.....

Accommodation.....

Address (in full).....

- Furnished/Unfurnished
- Owned/ Rented Delete as applicable

I hereby make application for assistance with removal expenses actually and necessarily incurred in connection with my new appointment, in accordance with the details attached, and I hereby declare that the information given above and the details of costs incurred are correct.

Signed..... Date.....

FOR THE APPOINTING OFFICER TO COMPLETE

Has the Trust's Removal Policy been explained to the applicant? Yes/ No

Was the application within the Trust's Removal Policy? Yes/ No

Signed..... Date.....

FOR COMPLETION BY DEPUTY DIRECTOR OF HUMAN RESOURCES

I confirm that the above application is/is not within the Trust's Removal Policy and that the application should/should not be processed.

Signed..... Date.....

(DIRECTOR OF HUMAN RESOURCES)

NEWHAM HEALTHCARE NHS TRUST

SUMMARY OF REMOVAL EXPENSES

		Claims	For Official Use Claims Allowed	Signature of Authorising Officer
1	Removal of Household furniture and effects.			
2	Storage			
3	Insurance			
4	Legal Expenses for Purchase			
5	Journey from old to new home			
6	Allowances during search for accommodation (see note 1)			

Claims under these headings should be made up to a suitable date on this form and thereafter periodically (e.g. quarterly)

Note 1 : The cost of travel and subsistence will be reimbursed up to a maximum allowed within the Whitley Council rates for up to two visits to the new area up to a maximum of four nights in total upon production of relevant receipts.

NEWHAM HEALTHCARE NHS TRUST

REMOVAL EXPENSES

AGREEMENT TO REMAIN IN SERVICE OF THE TRUST

In accordance with the Trust's Removal Policy you are required to sign the undertaking in respect of your removal expenses.

If you leave the service of the Trust within a period of two years, you will be expected to refund the whole part of the expenses paid under the removal expenses agreement except in the situation where the move is a result of unforeseen circumstances which are serious enough to justify us releasing you from this undertaking or where your appointment has been terminated.

.....

I confirm that I have read and understood the above.

Signed..... Date.....