**RELOCATION ASSISTANCE CLAIM FORM**

|  |  |  |  |
| --- | --- | --- | --- |
| First Name: |  | Surname: |  |
| Payroll ID: |  | NI Number: |  |
| Date of appointment: |  | Starting grade: |  |
| Current Address: |  | Relocating from: |  |

Please specify your claim below

|  |  |  |  |
| --- | --- | --- | --- |
| **FINANCIAL ASSISTANCE** | **AMOUNT INCURRED** | **AMOUNT CLAIMED** | **RECEIPT ATTACHED (\*and 3 quotations where appropriate)** |
| Removal expenses\* | £ | £ | 🞏 |
| Storage expenses\* | £ | £ | 🞏 |
| Travel and subsistence expenses | £ | £ | 🞏 |
| Visa expenses *(HR use: Wage Type 2806)* | £ | £ | 🞏 |
| Legal expenses | £ | £ | 🞏 |
| Temporary accommodation expenses (up to 12 weeks) | £ | £ | 🞏 |
| Visits to seek accommodation | £ | £ | 🞏 |
| Other (Please specify) | £ | £ | 🞏 |
| **Total Amount**  | **£** | **£** |  |
| **To be completed by HR – total claim to date:** | **£** |  |
| **Entitlement (10% of starting salary subject to maximum £5000)** | **£** |  |
| **Actual Amount Approved for Payment**  | **£** |  |

**Declaration**

I confirm that the above is correct, that the expenditure has been incurred, and that the claim is made in accordance with the Relocation Assistance Scheme. **I agree to repay Northumbria University a proportion of the amount claimed if I leave the organisation within 3 years, or the full amount if I do not commence employment.**

Claimant Signature………………………………………………… Date …………………………………………

**HR Budget Holder Authorisation**

Signed ………………………………………………………………… Date…………………………………………

|  |  |  |
| --- | --- | --- |
| **HR/PAYROLL USE ONLY** |  |  |
| Grade 6 >: |  |  | Date claim processed: |  |
| Starting Salary: |  |  | SAP check: |  |
| Fixed > 3 years/Perm: |  |  | Month of reimbursement: |  |
| P/t Pro-rata salary: |  |  | Remaining allowance: |  |
|  |  |  |  **CC: 100290 SIO: 501162** |

Relocation Assistance Scheme Policy

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Introduction

1. Relocation assistance will be provided to help with expenses incurred by new members of staff relocating to take up employment with Northumbria University.
2. These arrangements provide a contribution to the cost of relocation only and are not intended to meet all costs associated with relocation.

Eligibility

1. Relocation Assistance is open to new staff (at Grade 6 and above) who are employed on permanent or fixed-term contracts for a minimum of three years.
2. To qualify for relocation assistance, individuals must be:
* currently living more than 40 miles away from the location of their new work base;
* moving to a new permanent residence (either rented or purchased) located within 40 miles of their new work base.

Amount Available

1. The maximum amount of relocation assistance provided by Northumbria University will be 10% of annual starting base salary, up to a maximum of £5,000. For part-time staff, the maximum amount will be pro-rated against the full-time equivalent. This amount can be reimbursed for eligible expenditure as set out below.
2. All offers of relocation are subject to HM Revenue & Customs (HMRC) regulations. The member of staff will be responsible for any statutory income tax and national insurance liability incurred as a result of receiving relocation expenses. As the relocation is job related, HMRC allow for the £5,000 maximumto be exempt from tax provided that certain conditions are met, including that the new property is your main residence.

Costs Covered

1. Northumbria University will reimburse the expenses incurred in relocating that are deemed reasonable and allowable under HMRC regulations.
2. Reimbursements will not be apportioned to particular costs, but will not exceed the maximum allowance as stipulated above. Expenses deemed reasonable by Northumbria University include:
* Costs of transporting furniture and personal effects, including insurance\*
* Storage costs where a permanent move cannot be made immediately\*
* Travel and subsistence expenses (excluding gratuities) for the member of staff and their dependents, both during the move and in house-hunting.
* Visa cost for the member of staff only
* Fees incurred in selling property: this can include legal fees, estate agents fees, and advertising costs.
* Fees incurred in buying/renting property: this can include legal fees, mortgage indemnity fees, survey/valuation fees, land registry fees, and stamp duty.
* The cost of any unexpired lease where tenancy is involved
* The cost of engaging a relocation service provider
* Temporary accommodation for up to 12 weeks where a permanent move cannot be made immediately
* The University’s standard mileage rate will apply, when using personal transport.
* For clarity, visa costs for dependents and the cost of the NHS Immigration Surcharge are not allowable expenses under this scheme.

*\* Three competitive quotes should be obtained. Northumbria University will reimburse the lowest of the three quotes; however, it is at your discretion which quotation you accept.*

1. All relocation expenses must be supported by original valid VAT receipts.

Relocation Service Providers
2. Northumbria University has agreed discounted rates with three providers of relocation services, who can assist with all aspects of an individual’s move for a fee payable to the provider. Each company provides a range of different services, the main services they provide include:
* Home searches
* Area orientation
* School/nursery searches
* Removals
* Help with short term accommodation
* Immigration Services
1. For further information about the providers and how to make use of their services please contact Human Resources at humanresources@northumbria.ac.uk or on 0191 227 4343. Individuals can if they wish engage an alternative relocation service provider of their choice.
2. The cost of engaging a relocation service provider is deemed to be a reasonable expense for reimbursement, subject to the total costs claimed not exceeding the maximum allowance.

Application

1. A [Relocation Expense Claim Form](https://one.northumbria.ac.uk/hr/home/HR%20Forms/Relocation%20Assistance%20Claim%20Form.docx) , containing details of relocation expenses and supported by original valid VAT receipts should submitted to Human Resources in accordance with the provisions set out in this Scheme.
2. Claims for relocation expenses must be made within 12 months of starting employment with the University.
3. Expenses will be paid via the individual’s monthly salary. Claims need to be submitted prior to the payroll deadline for payment within the same calendar month.
4. Claims submitted prior to the individual’s start date, will receive reimbursement with their first pay after commencing employment.

Repayment of Relation Assistance

1. Relocation assistance is offered on the condition that member of staff agrees to repay some, or all, of the amount paid if you resign within 3 years of taking up employment at Northumbria University. In making a claim under the Scheme it is a requirement that you accept this condition.
2. The timescale for repayment begins from the start date of employment at Northumbria University. The amount repayable is reduced proportionally and is as follows:

|  |  |
| --- | --- |
| **Period of service(from start date of employment)** | **Amount to be repaid(as % of total amount paid)**  |
| Leaving within 12 months after their start date, or did not commence employment | 100% |
| Leaving within 12-24 months after their start date  | 50% |
| Leaving within 24-36 months after their start date  | 25% |

1. Repayment will not be required if the reason for termination of your employment is redundancy.
2. In the event that you claim relocation assistance and does not relocate, they will be asked to repay the full amount of relocation assistance given.

Application of Policy

1. Northumbria University retains the discretion to adjust the amount of relocation assistance in individual circumstances.
2. Relocation assistance is discretionary and it is not a contractual entitlement. Northumbria University reserves the right to withdraw it at any time.

This document was updated on **1 August 2016** and will be reviewed by **31 August 2019**