



## SOUTH EASTERN HEALTH & SOCIAL CARE TRUST

<b>Title:</b>	<b>Relocation and Associated Expenses Policy. (Medical and Dental Staff)</b>	<b>Ratified by Relevant Executive Directors: (As per signatory list)</b>	
<b>Ownership:</b>	<b>South Eastern Trust</b>	<b>Status:</b>	<b>Current</b>
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<b>Version No.</b>	<b>1</b>		
<b>Links to other policies</b>	<p><b>The policy does not replace the Terms and Conditions of service and should be read in conjunction with the following:</b></p> <ul style="list-style-type: none"> <li>• <b>Hospital Medical and Dental Staff Terms and Conditions - Paragraph 314-315</b></li> <li>• <b>Consultant Terms and Conditions Schedule 21</b></li> <li>• <b>HSS GEN 1/2010 Regional Guidance in Relocation, Removal and Excess Travel Expenses for Doctors in Training</b></li> <li>• <b>Associate Specialist Terms and Conditions of Service (Northern Ireland) 2008, Schedule 20</b></li> <li>• <b>Specialist Doctor Terms and Conditions of Service (Northern Ireland) 2008, Schedule 20</b></li> </ul>		

### **INTRODUCTION / PURPOSE OF POLICY.**

#### **1. INTRODUCTION**

This document outlines when relocation and associated expenses may be paid by the Trust and the process to be followed when processing requests. The policy will form the basis of all remuneration to Medical and Dental Staff for removal, accommodation and associated expenses. It shall serve as the prime document with regard to entitlement of such expenses.

#### **2. PURPOSE**

The purpose of the policy is to;

- To describe the circumstances under which Medical and Dental Staff are eligible for removal or relocation expenses.

- To ensure consistency of application in relation to relocation and associated expenses.
- To ensure a fair and equitable process for applying for relocation and associated expenses is administered.
- To ensure equality of opportunity, in the processing of applications.
- To ensure appropriate use of public monies in relation to relocation and associated expenses.

### **3. Duties And Responsibilities**

The roles and responsibilities of Medical HR, Management and applicants for relocation and associated expenses, are set out in the policy.

### **4. KEY POLICY PRINCIPALS**

The policy does not replace the terms and conditions of service and should be read in conjunction with the following:

- **Hospital Medical and Dental Staff Terms and Conditions - Paragraph 314-315**
- **Consultant Terms and Conditions Schedule 21**
- **HSS GEN 1/2010 Regional Guidance in Relocation, Removal and Excess Travel Expenses for Doctors in Training**
- **Associate Specialist Terms and Conditions of Service (Northern Ireland) 2008, Schedule 20**
- **Specialist Doctor Terms and Conditions of Service (Northern Ireland) 2008, Schedule 20**

A guiding principal of the policy is that applicants should not be financially disadvantaged by reasonable costs incurred through a move either in the interest of the service or to further their professional training. However they are not expected to profit from reimbursements in respect of relocation and associated expenses.

The level of financial assistance to be provided will be determined by the Trust, in agreement with the prospective employee, prior to the post being accepted.

There is no central budget for meeting relocation and removal expenses. The cost of paying relocation and removal expenses are to be met from Directorate delegated budgets.

Applicants or staff applying for relocation and associated expenses will be required to formally declare all previous re-imbursments claimed whilst employed with other Trusts in Northern Ireland. In relation to Junior Doctor applications normally only one claim for removal/relocation will be paid during the course of the doctors training programme.

Relocation expenses are not payable to an employee whose spouse, partner or other person normally residing with them is receiving or has received reimbursement of expenses from another Trust in respect of this move.

Each employee has an obligation to take all reasonable steps to minimise costs incurred and ensure the move to the new area is made within a reasonable timescale

All claims for payment must be supported by receipts. Estimates or quotes are not acceptable evidence to support the refund of expenses.

The time limit for submitting claims under the relocation policy will be 12 months from the date of employment commencing. This period can be extended with the approval of the HR Director.

## **5.1 Eligibility Criteria**

Relocation and associated expenses may be payable to both successful applicants who are joining the Trust and current employees.

In relation to **successful applicants joining the Trust** relocation and associated expenses will be only payable at the discretion of the Assistant Director/Service Manager, having been guided by Medical HR how the applicants meets the eligibility criteria stated in this section.

In relation to **current employees** relocation and associated expenses may be payable where the employee has been required by the Trust to move to a new place of work.

Eligibility to receive **relocation expenses** is conditional upon the member of staff undertaking to repay a particular portion of the expenses if they leave the Trust within two years of appointment. This will be at a rate of 1/24<sup>th</sup> of the total expenses for each month outstanding. The only exception to the 2 year period is in relation to rotational medical staffs that have shorter placements. In these circumstances the rotational doctors will only be required to repay if they leave prior to the agreed end date of their placement with the Trust and/or rotational training programme.

Relocation expenses will **normally** only be paid if the daily travelling distance from current home to the new place of work is greater than 40 miles (one way) . In these circumstances the employee may be required, as a result of their job role, to relocate to a new home closer to their place of work. **This distance is however not prescriptive** and the Trust will take account of all the circumstances of each case including; the applicants role and whether or not there is a business need for the employee to live within close proximity to work, the specific route travelled, the current infrastructure, the overall journey time and mode of transport.

In circumstances where a current employee is required to move to a new work location which results in them having to travel only a few additional miles per day, however this increase in mileage results in them travelling over 40 miles (one way), then the Trust will normally only pay excess mileage in these circumstances. As stated in the previous paragraph, the Trust will take account of all the circumstances of each case.

Employees may choose not to move house but rather to travel daily the greater distance between their home and new place of work. (Further details can be found in section 5.3 - Excess mileage in lieu of removal).

In certain circumstances a member of staff, who lives within 40 miles of the new place of work may also be required to move home. An example might be when a job has an on-call commitment which expects the post holder to live within a specified response time/distance.

## 5.2 Relocation costs available

The following categories of expenditure and maximum allowances will be applicable to eligible staff as follows;

Category	Criteria	Maximum
A	Employment contract is up to 12 months or less.	£1000
B	Employment contract is longer than 12 months AND the employee does not sell their former residence	£1000
C	Contract is longer than 12 months and the employee sells their former residence	£8000

Detailed below is a summary of the relocation expenses that **may** be payable once an employee has been deemed eligible for financial support in relation to removal expenses.

Expenditure Type	Category this applies to;
Legal Fees, Estate Agents, survey fees etc.	C
Removal and Storage of Furniture	A, B & C
Bridging Loans, for a duration of up to and not exceeding 6 months	C
Continuing expenses in the former residence where additional simultaneous accommodation charge in the new area cannot be avoided. The maximum period for expense to be claimed is 6 months	C
Travel and Subsistence Expenses may be claimed for themselves, their spouse/partner and children if applicable	C
Advance of salary, the Trust may make an advance, to assist with house purchase. This payment can only be processed once the employee has joined the Trust and is on the payroll.	C
Miscellaneous Expenses, (as a result of relocation) may be made on an item by item basis and paid within the maximum limits.	A,B & C

## 5.3 Excess Mileage in Lieu of Removal

As stated under section 5.1 above employees who meet all of the eligibility criteria may choose not to move house but rather to travel daily the greater distance between their home and new place of work.

The mileage that may be paid under these circumstances is the difference between the mileage from home to their designated base of work and the mileage from home to the new place of work.\*\*

Payments of excess travel costs will not be agreed where, in the judgement of the Trust, the journey time and/or distance involved is likely to be detrimental to the safety of the employee, and/or to the satisfactory performance of the employee's duties. In such circumstances, the Trust may wish to seek alternative arrangements which will address the needs of both the employee and the service.

Excess travel is paid at the appropriate rate according to employee's terms and conditions of service. Further information on the rate payable, can be obtained from the Medical HR Department.

Once the Trust has agreed that you are eligible to claim excess mileage, and the number of miles that can be claimed per journey, you will be required to regularly complete the mileage claim form on HRPTS, detailing all of the dates that you had to drive the excess mileage. Excess mileage is only payable on dates that you actually had to travel the excess miles.

*\*\* Designated base of work in the case of rotational doctors is usually, but not always, the first hospital on the rotation. Doctors may elect to have one of the other hospitals on their rotation as their designated base of work (if this is closer to their home address).*

#### **5.4 How to apply**

All employees who believe they are eligible to claim expenses must complete application form in Appendix 1 and return to Medical HR Department in the first instance: Medical HR Team, Lough House. Ards Community Hospital, Church Street, Newtownards, Bt23 4AS.

Following receipt Medical HR will consider each applications taking into account the eligibility criteria set out in the policy and recommend to the appropriate Directorate/Manager for the claim to be administered.

#### **EQUALITY STATEMENT**

***This policy has been drawn up and reviewed in the light of Section 75 of the Northern Ireland Act (1998) which requires the Trust to have due regard to the need to promote Equality of Opportunity.***

***In line with the duty of equality this policy has been screened against particular criteria and as a result no major issues requiring further impact assessment have been identified.***

***This policy has also been considered and prepared with regard to the Trust's obligation under the Human Rights Act 1998. The Trust is satisfied that the policy complies with its obligations under the Act.***

***If at any stage of the life of the policy there are any issues within the policy which are perceived by any party as conflicting with his/her rights, that party should bring these to the attention of the Director of Human Resources & Corporate Affairs or raise a complaint through the published complaints procedure.***

**SIGNATORIES**

(Those Directors & relevant Trust Leads who have ultimate responsibility for implementation of the policy – guidance regarding signatories can be obtained from XXXXX

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**Name**  
**Title** **Date:** \_\_\_\_\_

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**Name**  
**Title** **Date:** \_\_\_\_\_

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