

# RELOCATION ASSISTANCE POLICY APPLICATION FORM

## **(Academic and academic related staff and senior support staff. Staff financed by external funds would not normally be eligible.)**

Newly appointed staff in the above staff categories are encouraged to establish their homes within a 25-mile radius of the University site/campus at which their post is based. The following sets out the terms under which the University may reimburse the costs incurred by newly appointed staff in moving their homes to within a 25 mile radius of the University site/campus at which their post is based" at the time of appointment.

These provisions do not apply to new member of staff if your current address is within a 40 mile radius at the time of their appointment.

The University reserves the right to extend the removal and relocation provisions to other staff groups, and also to vary the provisions in certain circumstances.

## **AMOUNT OF CONTRIBUTION:**

### **Current address at time of appointment is within the UK:**

- 1 months gross salary up to a maximum of £8,000

### **Address at the time of appointment is based within the EU:**

- 1 months gross salary up to a maximum of £6,000
- The cost of an economy flight to the UK for the individual and their immediate family
- Maximum assistance of £8,000

### **Address at the time of appointment is outside of the EU:**

- 10% of gross salary up to a maximum of £8,000
- The cost of an economy flight to the UK for the individual and their immediate family
- The cost of removals of personal belongings to the UK
- Maximum assistance of £12,000
- Assisted by the interest free loan policy

Members of staff that are on fixed term contracts for less than 3 years and part time employees will receive a pro rata entitlement to financial assistance.

### **Term of appointment**

1 year of less  
1 - 2 years  
2 -3 years  
Permanent or over 3 years

### **Amount of entitlement**

No entitlement  
33.33%  
66.67%  
100%

## **GENERAL CONDITIONS**

- All claims under any of the above provisions must normally be presented within one year of joining the University. The University reserves the right to disallow any claim or part thereof, which is submitted for reimbursement after the first year. Any application for exceptional treatment under this condition must be made in writing to the Director of Human Resources stating the reasons why it has not been possible to present the claim within the prescribed period.
- Payment will be made on the production of three written quotations for personal removals, official receipts and proof of payment for all expenditure, subject to the member of staff's acceptance of the terms and conditions as stated. Should the three quotations not be provided, a full explanation will be required. Payments will only be made as a reimbursement of actual costs incurred.
- It is not compulsory, under HM Revenue & Customs rules, to sell your original property in order to qualify for the income tax exemption on relocation expenses but you must make your new property your sole or main residence. Normally, this would be the property that is the family home for most of the time.

## POSTS OF 3 YEARS DURATION OR MORE:

If the holder of the loan ceases to be a member of the University staff prior to completing 3 years of service they shall be required to refund a proportion of their total grant received, dependent on the amount of complete months worked. Where possible, any repayment to the University shall be deducted from the member's salary. These provisions do not apply to new member of staff if your current address is within a 40 mile radius at the time of their appointment.

### Example:

|   |  |
|---|--|
| Employee resigns after 21 months service with a total grant of £3,000 | $21/36 \times £3,000 = £1,750$<br>To repay: £1,250 |
|---|--|

Claimants should note that Her Majesty's Revenue and Customs (HMRC) have imposed a time limit in which to qualify for tax relief on the payment or reimbursement of expenses. Claims submitted after the end of the year of assessment (tax year) following the one in which the employee starts the new job will be subject to a deduction for income tax. Any reimbursement under the above scheme in excess of £8,000 will also be subject to income tax at the appropriate rate. The excess will be reported to the Revenue at the end of the tax year.

To register your application for the reimbursement of removal and relocation expenses, please return this request to Human Resources, University of Essex, Wivenhoe Park, Colchester CO4 3SQ, UK (email: [resourcing@essex.ac.uk](mailto:resourcing@essex.ac.uk)) marked for the attention of the Resourcing Team.

## AGREEMENT

I have read and understood the University's terms of reimbursement as they apply to removal and relocation expenses and I agree to be bound by the conditions as they may apply in my own circumstances, including the University's right to recover any outstanding removal and relocation expenses from my salary.

**PRINT NAME:** \_\_\_\_\_

**SIGNED:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

### For Resourcing Team use only:

|                   | <b>Entitlement</b> |
|-------------------|--------------------|
| UK Appointee      | 33.33%             |
| EU Appointee      | 66.67%             |
| Outside of the EU | 100%               |

**PRINT NAME:** \_\_\_\_\_

**SIGNED:** \_\_\_\_\_

**DATE:** \_\_\_\_\_