

PROTOCOL FOR THE PAYMENT OF GOLDEN HELLO OR ACCOMMODATION / RELOCATION ALLOWANCE

Sussex Partnership
NHS Foundation Trust

A Golden Hello or Accommodation/Relocation Allowance of up to £2000 will be paid to Band 5 and Band 6 practising Qualified Nurses and Qualified Allied Health Care Professionals who have applied for Registered Nurse / Health Care Professional vacancies will be eligible for payment as set out below, provided the conditions listed are met;

Eligibility for Golden Hello or Accommodation/Relocation Allowance:

- That the post is deemed eligible for payment (i.e. advertised as participating in the scheme)
- Applicants are not currently employed by SPFT on a permanent contract in one of the specified roles and have not been employed as such previously within the Trust (not on the payroll); therefore internal candidates who apply for either a sideways move or promotion are not eligible, but those staff stepping into a qualified position after completion of training or from another staff group are eligible.
- If you have previously worked for SPFT, then to be eligible for this payment, the gap after leaving the Trust would need to be 24 months or longer. This also applies to those who have retired.

Payment

You may opt to take **either** the Golden Hello or support towards Accommodation / Relocation costs.

1 Golden Hello

Payment of £2000 in three instalments will be made as follows:-

- On appointment – a payment of £1000 in the first month's pay when the individual has attended work.
- After 12 months – a second payment of £500 will be made on the first year anniversary of employment with the Trust.
- After 24 months – a final payment of £500 will be made.
- These payments are eligible for deduction of Tax and National Insurance, but would not be pensionable
- The Golden Hello would be pro rata'd for part time staff.
- In the event of an internal move during the 2 year period to a post not attracting the Golden Hello any payments made, or outstanding, will be reviewed on a case by case basis.

2 Relocation / Accommodation Allowance

You may claim up to £2000 towards the costs of relocating and/or accommodation costs (see appendix 1 for further details and conditions of payment) as follows:

- To be eligible for a relocation / accommodation allowance you must have:
 - permanently relocated at least 30 miles away from your new work base, and
 - moved within a 30 mile radius of your new work base.
- These payments will be tax free providing receipts are provided

- The allowance would be pro rata'd for part time staff
- No payment can be made until after you have started and claims may be staggered.
- In the event of an internal move during the 2 year period to a post not attracting the Allowance payments made, or outstanding, will be reviewed on a case by case basis.

The manager/recruitment team will clearly state on the recruitment paperwork that the post is eligible for the Golden Hello payment or Accommodation/Relocation allowance, subject to meeting the criteria. The monies will come out of the recruiting manager's budget unless an alternative budget code is supplied by them.

Internal moves

When a member of staff in receipt of the Golden Hello payment or Accommodation / Relocation allowance moves internally (i.e. sideways or promotion) during the two year period, the payment will be apportioned to the original / new service accordingly. Any movement to a post not attracting the Golden Hello or Accommodation / Relocation Allowance, will be considered on a case by case basis.

Return of Payment:

Where, within two years, a practitioner in receipt of a Golden Hello or an Accommodation / Relocation payment leaves a substantive post within the Trust, they will be required to return some or all of the payment received from their final month's salary, as specified below:

Less than 12 months	100%
From 12 – 18 months	75%
From 18 – 24 months	50%

The provisions for the return of payments will not apply where SPFT (HR Director or delegated Director) is satisfied that the practitioner has ceased to work in this capacity due to:

- enforced early retirement due to illness or injury
- death
- exceptional personal circumstances and with the approval of SPFT (HR Director)
- maternity (or other extended parenting leave agreed by SPFT) provided the employee gives an undertaking that they will return to practise and does so within a reasonable period, to be considered case-by-case by SPFT. (As a minimum absences of up to one year will normally be considered reasonable, but requests for any longer periods should be considered by SPFT (HR Director).

Absence

Periods of absence shall not be included in the two year period of time for eligibility for the Golden Hello payment or Accommodation/Relocation allowance, including maternity, sickness (over 7 calendar days), career break, and suspension. If an individual does not return from their absence to complete the year, and have been in receipt of the Golden Hello or the Accommodation/Relocation allowance, we would recover the money owed.

The manager/recruitment team will clearly state on the recruitment paperwork that the post is eligible for the Golden Hello payment or Accommodation/Relocation allowance, subject to meeting the criteria. The monies will come out of the recruiting manager's budget unless an alternative budget code is supplied by them

Appendix 1

RELOCATION /ACCOMMODATION EXPENSES

Relocation must be completed within one year of commencing in post.

Relocation is defined for Homeowners as the sale of their current property and purchase or rental of a property within the defined area. For Non Homeowners relocation is defined as disposal of their current rented property and rental of a property within the defined area

Original receipts must be produced as proof of expenses before reimbursement will be made.

It is the responsibility of managers to notify Payroll on the termination notice whether an employee who has less than two years' service with the Trust has been granted relocation expenses.

If an employee receives monies for relocation and does not relocate within the agreed timescale, the Trust will reclaim the payments. The employee will be expected to provide confirmation and supporting evidence to the manager that they have moved within the agreed timescales.

The member of staff may use the total sum flexibly as long as it is used for the following purposes.

Payment will only be made against receipts after the expenses have been incurred.

Homeowners

a. Furniture removal and storage

- The lowest of 3 quotations for removal of furniture and belongings, inclusive of storage charges and insurance, where appropriate. Storage charges will not be reimbursed where there is no intention to move the property to the new residence.
- Travel expenses for one return journey home if necessary to supervise the removal

b. Legal and other expenses incurred in the house sale

- solicitors and other legal fees
- estate agents fees or advertising costs
- mortgage redemption fee

c. Legal and other expenses incurred in the house purchase

- solicitors and other legal fees e.g. land registry fees, mortgage application fees, stamp duty
- surveyor's report

d. Tenancy Agreements (if there is a need to rent during the relocation period)

- legal and other costs incurred in terminating/starting up tenancy agreements

e. Search for new accommodation

- travel expense actually incurred for one return journey home, if search is undertaken prior to taking up new post
- f. Miscellaneous expenses, essential items integral in previous home e.g. carpets, curtains, fridge, cooker. Items such as satellite/ cable installation and dishwashers are not included, unless agreed by management discretion. Payment will not be reimbursed for expenses which are not essential to the sale or purchase of the property e.g. expenses relating to renovation or redecoration. Payment will generally not be considered for any costs that would be considered non-exempt relocation expenses by her Majesty's Revenue and Customs.
- g. Property rental during the relocation period

Non Homeowners

- h. rent
- i. Furniture removal and storage – as in a. above
- j. Tenancy Agreement – as in d. above
- k. Travelling and accommodation expenses during the relocation period - as in e. and g. above
- l. Miscellaneous expenses – as in f. above.

TAXATION

The majority of elements of relocation expenses are normally exempt from tax provided that:

- l. they are properly receipted, and
- m. within the cost limit set, and
- n. relocation is completed by the end of the tax year following the one in which the post holder came into post. For example if the post-holder takes up post on 1st July 2007, relocation must have been completed by 31st March 2009.

The Trust is required to declare payments for tax purposes annually. Any queries on the taxation circumstance for individuals must be taken up with the Tax Office. The Trust is not in a position to advise on such matters.

Further guidance is available from your local Tax Office.

PROCESS OF APPLICATION

The Recruitment Team will confirm in the offer letter/Terms and Conditions of Employment that the claimant is eligible to apply for accommodation / relocation expenses and will send them a claim form.

MAKING A CLAIM

Each time a claimant wishes to make a claim s/he should complete a Claim for Relocation (Repayment) form. Full details of the claim should be submitted with supporting receipts or travel claim forms as appropriate. Claims should be submitted as soon as possible after the expense has been incurred.

The completed claim form and receipts should be forwarded to the line manager for checking that the claim is within the agreed amount and supported by **original receipts** and authorisation.

Once authorised the line manager should send the form with original receipts to Payroll for reimbursement in the next appropriate pay run. The Line manager should retain a copy of this form for their records.

RECOVERY

If a member of staff leaves before completing two years of service the manager completing a termination notice must specify on the form that relocation assistance has been granted and how much has been paid. The termination form must be completed and submitted to Human Resources as soon as the manager is aware of the resignation.

Providing the Record of Relocation Expenses Form is submitted promptly, Payroll will be responsible for arranging recovery in the manner specified on the repayment agreement form. If it is not possible to recover payments owed the Trusts normal overpayment process will be followed.

CLAIM FOR ACCOMMADATION / RELOCATION EXPENSES

NAME:		WARD / DEPARTMENT:	
JOB TITLE:		HOURS OF WORK: (state hours per week)	

TYPE OF EXPENSE (see notes overleaf)	DESCRIPTION OF EXPENSES CLAIMED	AMOUNT CLAIMED
Costs of Disposing of Previous Home		
Costs of Acquiring New Home		
Costs of Moving Possessions		
Tenancy agreements and letting fees		
Rent		
Approved Miscellaneous expenses		
TOTAL AMOUNT CLAIMED: (Up to a maximum of £2000 ((pro rata for part time staff))		

DECLARATION

1. I wish to apply for relocation expenses in accordance with the Trust's protocol for the payment of golden hello or accommodation / relocation allowance, which I have read.
2. I confirm that the claims I shall make will be necessarily incurred by me as a result of my appointment to a post with the Trust.
3. I also confirm that:
 - a) None of the expenses claimed are recoverable from any other source.
 - b) In the event of terminating my employment with the Trust within two years I shall repay the amount as detailed in the Trust's protocol for the payment of golden hello or accommodation / relocation allowance,
 - c) I understand that agreement to pay the full sum will cease if a move to permanent accommodation has not taken place within one year of taking up appointment.
4. Homeowners only:

I can confirm that I shall be selling the property which I current own in order to purchase a permanent property in the new area.

Signed: _____

Dated: _____

LINE MANAGER APPROVAL:	
Relocation expenses approved to a maximum of £_____	
Existing Homeowner/Existing Tenant*	
<i>*please delete as applicable</i>	
Receipts attached : YES / NO*	
<i>*please delete as applicable</i>	
Authorised (please print)	Signature:
Designation:	Date:

PLEASE SEND COMPLETED FORM, WITH RECEIPT ATTACHED TO PAYROLL