

APPLICATION FORM

Loan from the University of Manchester to purchase a public transport season ticket

Before completing this form please read the terms and conditions of the Loan Scheme and determine the cost of your particular season ticket.

Please complete this form in Block Capitals and take it, together with any other appropriate information (see 'Travel Loans to Employees' section), to your local Human Resources Office **at least 3 weeks before the start date of your season ticket**. Please read notes 'How to apply for a public transport season ticket loan'.

SECTION ONE To be completed by the employee applying for the loan

A Your details

Name

Home address

Department and building

Postcode

Telephone

National insurance no

Payroll Number

Email address

B Details of the season ticket to be purchased

Bus, tram or train company

From (starting station)

To (destination station)

Type of ticket

I have enclosed a passport size photograph and completed season ticket application form (where applicable).

Total cost of season ticket

Desired starting date

Loan applied for

Current travelcard membership number (if you have one):

C Repayment details

If my loan application is approved, repayment will be made by the under noted deductions from my salary, commencing on the first available pay day following collection of my season ticket.

10 monthly instalments of £.....:.....

D Data Protection Notice

The personal information which you have provided by completing this form, and any other information provided in connection with your application, will be used by the University to process your application and to set up and administer the loan process, which will include arrangements for calculating and making payments. We will keep the information you have supplied confidential and will not disclose it to any third party, unless we are required to do so by law, or you have given your consent.

E Declaration by applicant

I confirm that the information which I have given in this form is correct and authorise the University of Manchester to use the information I have provided for the above purposes.

I am applying for a loan of £:..... which I confirm is to be used to purchase the above season ticket to be used primarily for my home to work travel.

I accept the terms and conditions of the loan and authorise the University to make appropriate deductions from my salary each month to repay the loan. None of the terms of this agreement constitute a hire purchase agreement.

Signature

Print Name

Date/...../.....

F Please indicate your current mode of transport

.....

SECTION TWO**Application Review to be completed by HR**

Has all information required been provided?

Yes

☐

No

☐

Does the loan applied for fulfil the conditions of the loans scheme?

Yes

☐

No

☐

Is the applicant set up as an employee?

Yes

☐

No

☐

Is the applicant permanent/casual/fixed term?

Perm

☐

Casual

☐

Fixed

☐Review completed &
application approvedApplication sent to
ticket provider

Name

Initials

Date

SECTION THREE**(to be signed by the employee on collection of their season ticket)**

I acknowledge receipt of my season ticket, which is in accordance with my requirements as detailed in section 1 (B) front page.

Signature

Print Name

Date

Payroll set-up *(to be completed by Payroll)*Monthly deductions
commence

Date

Input by

Initials

Date

Checked by

Initials

Date

Travel Plan Loans to Employees

Introduction

As part of the University's commitment to the Higher Education Precinct Travel Plan, the University offers staff an interest free loan facility to purchase public transport annual season tickets. The following explains how staff at the University can take advantage of this initiative.

How the Scheme Operates

A member of staff can apply for a bus, tram, train or county bus annual season ticket and the University will purchase it on their behalf. The member of staff then repays the cost of the ticket by monthly instalments directly from their salary. By purchasing a season ticket this way staff may receive additional discounts on public transport into and around Manchester.

How to apply for a public transport season ticket loan:

1. Complete section one of the University's loan application form.

Please note:

- Applicants must have been a salaried member of the University for at least 3 months and have a payroll number.
 - Season tickets must be for one year.
 - The maximum value of the loan available is £2,500 or 5% of gross annual salary (whichever is the greater).
- Please note that this is subject to individual approval.

2. The various ticket providers have different procedures to follow when applying for a ticket. Please see below what documentation needs to be attached to the loan application for the ticket that you wish to purchase.

GMPTE - System One, County Bus and Train, Young Persons

If you are renewing your travel pass and currently have a membership card with photo ID please attach a photocopy of that membership card to your loan application. This will enable us to provide GMPTE with your current membership details and obtain a new season ticket.

If this is the first time that you are applying for a travel pass please attach a passport style photograph to your loan application. In addition to the annual season ticket GMPTE will issue a membership card for you.

There is no need to complete any forms other than the loan application.

Stagecoach - Megarider

Please attach a passport style photograph to your loan application. The University will issue a travel pass to you.

There is no need to complete any forms other than the loan application.

First Manchester Bus

If you are renewing your travel pass and currently have a membership card with photo ID please attach a photocopy of that membership card to your loan application. This will enable us to provide First Bus with your current membership details and obtain a new season ticket.

If this is the first time that you are applying for a travel pass please attach a passport style photograph with your loan application. In addition to the annual season ticket First Manchester will issue a membership card for you.

There is no need to complete any forms other than the loan application.

Burnley and Pendle

Complete the travel loan application form with details of the annual ticket that you require.

There is no need to provide a photograph.

Arriva

If you are renewing your travel pass and currently have a membership card with photo ID please attach a photocopy of that membership card to your loan application. This will enable us to provide Arriva Bus with your current membership details and obtain a new season ticket.

If this is the first time that you are applying for a travel pass please attach a passport style photograph with your loan application. In addition to the annual season ticket Arriva will issue a membership card for you.

There is no need to complete any forms other than the loan application.

Finglands

If you are renewing your travel pass and currently have a membership card with photo ID please attach a photocopy of that membership card to your loan application. This will enable us to provide Finglands with your current membership details and obtain a new season ticket.

If this is the first time that you are applying for a travel pass please attach a passport style photograph with your loan application. In addition to the annual season ticket Finglands will issue a membership card for you.

There is no need to complete any forms other than the loan application.

Metrolink

If you are renewing your travel pass and currently have a Metrolink Travel Club Membership Card with photo ID please attach a photocopy of that membership card to your application. This will enable us to provide Metrolink with your current membership details and you only need to complete the travel loan application form.

If this is the first time that you are applying for a travel pass or your Metrolink Travel Club Membership Card has expired please attach a passport style photograph with your travel loan application form and complete the Metrolink Travel Club Membership Card application form which is available from the Metrolink website. Alternatively, you can contact your local HR Office who will e-mail a copy to you. Metrolink will issue a membership card and season ticket for you.

Please ensure that you put the correct start and destination stations on the travel loan application form. Metrolink will calculate the ticket price based on that information which will then show on your ticket.

Train Tickets

Whether you are renewing your season ticket or making an application for the first time, you will need **to complete a Northern Rail Corporate season ticket application form & the University's loan application form.** Both are available online.

Please note: You MUST tick 12 months on the Northern application. The University only organises ANNUAL tickets under this scheme.

If you are renewing your season ticket and currently have a Photocard with a Photocard Number please attach a photocopy of the Photocard to your loan application & Northern Rail Corporate season ticket application form.

If this is the first time you are applying for a rail season ticket please attach a passport sized photograph of yourself to your loan application and Northern Rail Corporate season ticket application form. We will then apply to Northern Rail for a Photocard for you as part of your order.

Please note: Northern Rail can organise ANY season ticket for you, whether inside or outside their network or a GM Traincard.

3. The applicant should take the completed application form together with any supporting documents as indicated above, to their local HR office.
4. HR check the application to ensure the applicant is eligible to apply and that their application meets all of the loan criteria. If the loan application is successful and is approved by HR then they send off the application to the relevant travel company.
5. Once the season ticket application has been processed by the travel company they will send the season ticket to the local HR Office who will contact the applicant to come and collect the ticket. On collection the applicant will sign to acknowledge receipt (section 3 of application form).
6. HR send a copy of the completed application form to the University's Payroll Office who will then arrange for deductions to be made commencing the first month that the season ticket comes into operation. If the applicant has not collected their season ticket by the first day of the month that the season ticket is to be valid from then the University will return the ticket to the travel provider and the loan application will be cancelled. If there is a delay in processing the travel ticket application on the part of the travel provider the University will contact the applicant to advise them.
7. If your public transport operator or ticket type is not covered by the above please contact Andrew Hough, Travel Plan Coordinator; a.j.hough@mmu.ac.uk extension 1364 who works on behalf of the University of Manchester.

How to repay the loan

Repayment of the loan will be by direct deductions from the applicant's net salary and will commence from the first available pay date after the season ticket comes into operation. Repayment will be made in 10 equal monthly instalments. If the applicant ceases to be employed by the University before the loan is fully repaid, the outstanding balance on the loan must be cleared before the last day of employment at the University.

Travel Plan Loans to Employees

Terms and Conditions

Applying for a Loan

- Loans are available to assist eligible employees of the University with the purchase of bus, tram or train season tickets, which are suitable for, and purchased primarily for, the employee's home to work travel.

The season ticket purchased with the loan must be one of the University's approved Travel Scheme season tickets and also be for a period of one year.

- The maximum loan available to an employee for the purchase of season tickets is £2,500 or 5% of gross annual salary (whichever is the greater. Subject to individual approval). An employee may receive loans to assist with the purchase of more than one season ticket, if their home to work journey involves travel with two or more travel companies, but the total loans advanced to the employee is limited to £2,500 or 5% of gross salary in any one year.
- Before granting a loan the University may, at its discretion, require applicants to provide:
 - proof as to the affordability of the loan repayments the applicant would be required to make if the loan was granted.
 - security to indemnify the University against loss arising from failure to repay the loan.
- Provision of inaccurate information or failure to disclose to the University information which, if known, may have influenced the decision as to whether to grant a loan will disqualify the employee's application. It will also result in cancellation of any loans already granted to the employee with full repayment of all outstanding balances being required immediately. It may also result in the University considering whether more formal action is appropriate.
- The University reserves the right to refuse any application for a loan.

Interest

Loans are currently interest free. The University reserves the right to review this from time to time and to charge interest on loans at a specified rate.

Repayments

- Repayment is by deduction of instalments from the employee's salary or wages. The instalments are 10 equal monthly instalments. Deductions commence on the first available pay date following the date that the season ticket comes into operation.

The loan repayment period is determined when the loan is approved and will remain unchanged even if the travel company subsequently agrees to amend the season ticket period.

- If an employee leaves the employment of the University before the whole loan has been repaid, the balance of the loan becomes immediately payable and will be deducted from the employee's final pay cheque. If the outstanding balance on the loan exceeds the employee's final pay cheque, the employee is required to pay the full outstanding balance before their last date of employment. The employee may be eligible for a part refund if they no longer wish to make use of the ticket. The employee should contact the travel provider directly to progress this.
- If at any time the borrower fails to comply with these conditions the University is entitled to terminate the loan agreement and deduct any outstanding amounts from any sums due to the borrower, including amounts due in respect of salary, and to demand immediate repayment of any sums not so discharged.

Season Tickets

- Season tickets purchased by the University for employees are subject to the issuing company's terms and conditions.
- Care of the season ticket is the employee's responsibility. The University accepts no responsibility for any losses arising from theft, loss or damage to the ticket. If the ticket is lost or stolen this should be reported to the police and a crime reference number obtained. Replacement tickets should be organised via the relevant transport operator.
- If for any reason an employee no longer wishes to use their season ticket, the employee should contact the relevant travel operator to organise a refund under the operator's terms and conditions. Please note that payments via salary will continue until the loan is repaid.
- Season tickets will not be renewed automatically. The onus is on the employee to apply to the University if renewal is required. The application for the loan to purchase the new season ticket should be submitted at least 6 weeks prior to the old ticket's expiry date.