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| C:\Users\mtfssjc2\Desktop\UoM logo.png | **Overseas Working Form**  **Questionnaire & Assessment** |

**In order to comply with University of Manchester regulations and procedures, this should be completed by the line manager in conjunction with the relevant P&OD Partner and the employee regarding the employee’s University of Manchester assignment only.**

**Please ensure all questions / boxes are completed so this can be dealt with in a timely manner**

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| **OW1 Section: Details of Individual and Assignment** |

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| **First Name** |  | **Surname** | |  |
| **Staff number** |  | **Nationality** | |  |
| **Assignment start date** | Click or tap to enter a date. | **Assignment end date** | | Click or tap to enter a date. |
| **Current country of residence** |  | **Host country / countries** | |  |
| **Host country Immigration arrangements** | *Visa type:*  *Duration:* | **Will the individual be teaching overseas?** | | *Yes / No* |
| **Job Title** |  | **Faculty / Directorate** | |  |
| **Assignment status**  *(Delete and add as appropriate)* | I.e. Proposed pending grant funding / Proposed pending hire / Confirmed pending start date / Live currently on assignment Click or tap here to enter text. | | | |
| **Reason for assignment**  *(Delete and add as appropriate)* | I.e. Personal reasons / permanent work location / fixed term UoM research returning to the UK at the end / Unpaid research sabbatical based at another University. Please elaborate your answer. | | | |
| **Working pattern** | Please confirm the percentage of your working time which you will spend in each country and any other relevant details. | | | |
| **Duties**  *(Delete and add as appropriate)* | Describe your duties and activities while on the overseas assignment. Please elaborate here:  Specific activities confirmation*:*  *- This is a research role:* **Yes / No**  *- Will there be any teaching & training overseas:* **Yes / No**  *- Signing contracts on behalf of the University:* **Yes / No**  *- Activities for the commercial benefit of a third party:* **Yes / No**  *- Who instructs the assignee and where do they report to?* ***UoM / Third party***  *- Is the activity likely to generate income, i.e. surplus (profit)?* **Yes / No**  *- Where is the activity carried out: i.e.* ***Rented office / home / Third party location*** | | | |
| **Salary and employment arrangements**  *(Delete and add as appropriate)* | *- The individual continues to work for and be paid by the UoM:* **Yes / No**  *- Will the individual have dual employers during this assignment:* **Yes / No**  *- There is a recharge of the costs between the foreign entity and UoM:* **Yes / No** | | | |
| **Do you anticipate any additional costs / payments** | Will any additional benefits be provided such as living allowances or accommodation? If so, please list the benefit to be provided and the name of the entity that will provide them / bear the cost | | | |
| **Source of funding** | Please provide details of where the funding for this assignment is coming from and the basis on which it is being provided | | | |
| **Employee status when working for an overseas** | I.e. They will continue to be a UoM Employee / honorary staff / Unpaid Sabbatical from UoM / etc? | | | |
| **Does individual wish to opt out of the USS Pension?** | NOTE: In most cases, the host country will not provide tax relief on the employee or employer contributions to the UK’s USS pension. Opting out will only be possible where the individual arranges for a personal pension in the host country instead. | | | |
| **The individual agrees to settle their personal liabilities in relation to any UK or international taxes or social security.** | | | Please confirm here. | |

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| **Does this assignment have Dean (for Faculty assignments) or Registrar (for PS assignments) approval** | Approval is only required once it is confirmed that this assignment will go ahead, it is not required at funding proposal stages. |
| **Has a risk assessment been carried out and submitted to the local P&OD Partner** |  |
| **Which activity code should be used for any external professional fees incurred relating to this assignment (not P or R codes)?** |  |

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| **Signed and approved by Line Manager** |  | **Date** | Click or tap to enter a date. |
| **Signed and approved by P&OD Partner** |  | **Date** | Click or tap to enter a date. |

**End of Form**

**Please return to Global Mobility at** [**people.globalmobility@manchester.ac.uk**](mailto:people.globalmobility@manchester.ac.uk) **and copy in your P&OD Partner**

**The Global Mobility team will provide a risk assessment and confirm if this process can move forwards to the next stage.**

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| **OW2 Section: Overseas Working Assessment** |
| **Internal use only**: This section of the form is to be completed by the Global Mobility Team. |

**This section provide the assessment findings from the Global Mobility team, based on the information submitted above.**

**If the overseas assignment is to proceed following advice provided here, this form must be signed by the Dean (for Faculty assignments) or Registrar (for PS assignments) and returned to the Global Mobility Team at** [**people.globalmobility@manchester.ac.uk**](mailto:people.globalmobility@manchester.ac.uk) **with confirmation of the start dates of the assignment.**

**Please note: if any of the information from the submitted OW1 changes, the Global Mobility Team must be informed immediately by either the employee, the manager, or the People & OD Partner - as it may impact the liabilities for the university and the employee.**

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| **The request was for:** | | | | | | |
| **Research Activities** |  | **Field Work** |  | **Other Strategic Related Activities** |  |
| **Teaching overseas** | *Yes / No* | | | **Personal reasons** |  |

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| **Overview of reasons for request to work overseas** |
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| **Risk Rating of Request** |

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| **This is a:** | **Final Assessment** |  | **Interim Assessment** |  |
| ***Note: for interim assessments further legal advice is required, we will need your permission to engage with the solicitor*** | | | | | |

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| **Was external legal advice sought as part of this assessment?** | **Yes** |  | **No** |  |
| If YES, please give brief details: | | | | |
| **Is any or further external legal advice required in addition to this assessment?** | **Yes** |  | **No** |  |
| If YES, please give brief details: | | | | |

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| **Overall risk associated with the case is:** | | **Summary notes relating to risk rating** *(if applicable)***:** |
| **Very High** |  |  |
| **High** |  |
| **Medium** |  |
| **Low** |  |

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| **Following assessment, the Global Mobility team’s recommendation that this overseas assignment takes place is:** | **Yes** |  | **No** |  |
| If NO, please give brief details: | | | | |

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| **Findings from Assessment** |

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| **Summary of key findings of the assessment** |
| **PE Risk rating**:  **Immigration UK:**  **Immigration Overseas:**  **Payroll obligations UK**:  **Payroll obligations Overseas**:  **Tax obligations**:  **Social security obligations**:  **Data Export controls**:  **FCDO Country Guidance**:  **UOM risk country** **list**:  **UOM travel insurance coverage**:  **Activity Code required**:  **Other**: |

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| **Permanent Establishment (PE) / Corporate Entity Risks** | | | | | | | | | | |
| **Is there a risk of creating a Permanent Establishment in the host country?** | | | | | | **Yes** | |  | **No** |  |
| Details of assessment and Risk Rating: | | | | | | | | | | |
| **Very High** |  | **High** |  | **Medium** |  | | **Low** | | |  | |

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| **Does the individual have a Right to Work in the host country?** | **Yes** |  | **No** |  | **Not Known** |  |
| Please give brief details: | | | | | | |

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| **Are we required to set up a local entity in the host country?** | **Yes** |  | **No** |  | **Not Known** |  |
| If YES, please give brief details: | | | | | | |

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| **Are we required to set up a local bank account in the host country?** | **Yes** |  | **No** |  | **Not Known** |  |
| If YES, please give brief details: | | | | | | |

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| **Will a shadow international payroll be required for this assignment?** | **Yes** |  | **No** |  | **Not Known** |  |
| If YES, please give brief details: | | | | | | |

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| **Income Tax Information** | | | | | | |
| **Is there a tax treaty exemption available?** | **Yes** |  | **No** |  | **Not Known** |  |
| Details of assessment: | | | | | | |

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| **Social Security / National Insurance Information** | | | | | | |
| **Can we apply for a Social Security exemption?** | **Yes** |  | **No** |  | **Not Known** |  |
| Details of assessment: | | | | | | |

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| **Actions or Further Information Required** |

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| **Actions or further information required by the Global Mobility team before an assignment can commence:** | |
| **Action or further information required:** | **Date required by:** |
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| **Assessment Completed** |

**This assessment has been completed by the Global Mobility Team, if this is an interim assessment then a further updated assessment will follow if permission to seek legal advice has been given.**

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| **Name** |  | **Signature\*** |  | **Date** |  |

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| **Approval of Assignment Section** |

**If the overseas assignment is to proceed following review of the advice and assessment provided, this form must be signed by the Dean (for Faculty assignments) or Registrar (for PS assignments) and returned to the Global Mobility Team with confirmation of the start dates of the assignment.**

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| **Approval for Assignment to Proceed: Dean of Faculty or Registrar** | | | | | |
| **Name** |  | **Signature\*** |  | **Date** |  |

***\**** *If you are completing this form electronically you can type your name in the signature box as we will accept your email/an email chain as confirmation of your signature, or you can save the form as a PDF and electronically sign the document*