|  |  |
| --- | --- |
| C:\Users\mtfssjc2\Desktop\UoM logo.png | **Relocation Expenses Claim Form for Staff** |

**Guidance notes and category information (Cat No) can be found on the reverse of this form.**

**Please ensure all sections are fully completed and return the completed form to your faculty/department Employment Services team, details can found at:**

[**People and OD Operations | Directorate of People and Organisational Development | StaffNet | The University of Manchester**](https://www.staffnet.manchester.ac.uk/people-and-od/aboutpeopleod/contact-us/peopleod-operations/)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Name:** |  | **Surname:** |  | **Staff Number:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Relocating From: *(old address)*** |  | **Relocating To:**  ***(new address)*** |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Cat**  **No** | **Details of Expenditure** | **Amount Claimed** | | **Office Use: P&OD to Complete** | | | |
| **Foreign Currency** | **GBP £** | **Amount Appr for Payment** | **Subject to UK Tax/NI** | | **Comments** |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
|  |  |  |  |  | **Yes** |  |  |
| **No** |  |
| **TOTAL** | |  |  |  |  | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **CLAIMANT DECLARATION: I confirm that the above expenses were incurred by me whilst relocating my main residence to take up employment at the University. I understand that reimbursements are made on the basis of a decreasing loan and that should my employment with the University terminate within two years of appointment, I will be required to repay a proportion of the total amount of expenses paid to me. I consent to you making any such necessary deductions from my salary in accordance with the Relocation Policy.** | | | |
| **Signature of Claimant:** |  | **Date:** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **APPROVAL: To be completed by P&OD (Global Mobility / Employment Services)** | | | | | |
| **Faculty/Directorate:** |  | **School/Div:** |  | **Activity & IE Codes:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Total amount approved for payment: complete relevant box to indicate to payroll if the payment IS or IS NOT subject to UK Tax and National Insurance** | | | |
| **Amount:**  **NOT SUBJECT TO UK TAX/NI** |  | **Amount:**  **SUBJECT TO UK TAX/NI** |  |

|  |
| --- |
| **Comments:** |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Authorised by (Signature):** |  | **Authorised by (Print):** |  | **Date:** |  |

**Guidance Notes for Claimants**

* Further details of eligibility criteria is available on the Relocation Assistance Programme Overview available on StaffNet [Relocating to Manchester | Directorate of People and Organisational Development | StaffNet | The University of Manchester](https://www.staffnet.manchester.ac.uk/people-and-od/new-staff/relocating-to-manchester/)
* You may claim for expenditure incurred within the categories set out on the next page, up to the total amount allocated to you in your offer letter and in accordance with the Relocation Policy. The University will not reimburse expenses for services provided by another party that our relocation partner could have provided unless you have had approval from Global Mobility in advance. For example, you cannot claim for the cost of moving your furniture if you chose to use another removal service other than the University’s relocation provider. Any currency conversions required will be completed by P&OD based on the receipt date of the expenditure.
* Expenditure in categories 1 to 5 is exempt from UK Tax and National Insurance Contributions for amounts up to a total of £8,000 in accordance with HMRC rules, if they are in connection with moving your main residence. If for example, you stay in your new home only during the week, return to your existing family home most weekends and your family do not intend to move permanently to your new home, then your old home will probably remain your main residence. However, if you buy a new home, move into it with your family and rent out your old home, your new home will probably be your main residence.
* For reimbursement of Visa and Immigration Health Surcharge costs and how to claim, please see the following link:

<http://www.staffnet.manchester.ac.uk/human-resources/current-staff/pay-conditions/expenses/expenses-forms/>

* All data collected on this form is processed in accordance with the[**privacy notice**](https://documents.manchester.ac.uk/DocuInfo.aspx?DocID=37024)**.**

**How to Submit your Claim Form**

* All claims must be accompanied by high quality legible scanned/photographed receipts or invoices. We may request originals following a claim submission so please ensure you retain the originals. Credit card statements, bookings, registration or application forms, cheque stubs etc **DO NOT** qualify as receipts/invoices.
* All receipts must be official receipts on letter headed paper where applicable and fully annotated and in the claimant’s name where applicable.
* Claims must be submitted within **THREE MONTHS** of incurring the expenditure. Claims submitted after this period may not be reimbursed. Reimbursements will be made directly into your bank account.

|  |  |  |
| --- | --- | --- |
| **CATEGORY 1** | **Travel & House Hunting:** includes employee and direct family only (partner and children) | |
| **Qualifying: Saver or standard fare only** | **Non-Qualifying** |
| * Flight (one way and direct) * Train and/or Bus * Car rental (cheapest of 3 quotes) * Mileage 40p for first 150 miles and 25p thereafter * Boxes / packaging to move * 1 night stay in accommodation: Hotel or Air BnB*\** * Reasonable meals (at UoM discretion) *\** | * Claim for staying with friend/relative * Alcohol * Sundry items e.g. snacks, sweets & drinks * Childcare costs * Healthcare surcharges and travel insurance * Suitcases |
| *\* Only available for claiming against one house hunting trip* | |

|  |  |  |
| --- | --- | --- |
| **CATEGORY 2** | **Temporary Accommodation OR Travel:** If started in post at the University before moving into new main residence, you cannot claim for both temporary accommodation and travel | |
| **Qualifying** | **Non-Qualifying** |
| * Travelling costs to commute from old home to The University if starting before move is complete:   + Train and/or Bus   + Mileage 40p for first 150 miles and 25p thereafter * Rent * Estate agent fees * Hotel, short stay, standard room or Air BnB | * Claim for staying at a friend/relative home * Cleaning of home/décor and Service Charge * Rental deposits * Storage costs * Childcare costs |

|  |  |  |  |
| --- | --- | --- | --- |
| **CATEGORY 3** | **Sale and Purchase of Home** | | |
| **Qualifying** | | **Non-Qualifying** |
| * Legal fees * Stamp duty * Estate agent fees and/or auctioneer fees * Surveys and valuations | * Land registry fees * Advertising * Insurance on empty property until sold | * Cleaning of home/décor * Gardener fees * Rental deposits * Storage costs * Council tax |
| * Interest payments on bridging loan: to redeem a loan secured on your old home or to purchase your new home and does not exceed the market value of your old home at the time you purchase your new home | |

|  |  |  |
| --- | --- | --- |
| **CATEGORY 4** | **Utilities** | |
| **Qualifying** | **Non-Qualifying** |
| * Cut off and connection fees for gas, electricity, and land line telephone | * Cut off fee for mobile and new sim cards * Personal subscriptions * Broadband, TV etc |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **CATEGORY 5** | **Domestic Goods:** only if existing cannot be transported or moved to new home | | | | |
| **Qualifying** | | **Non-Qualifying** | | |
| * Cooker * Fridge * Freezer * Curtains | * Carpet * Curtain pole * Washing Machine | * Dryer * Toaster * Blenders etc. * Microwave * Pressure cooker | * Kettle * Vacuum * Iron * Dishwasher * Television | * Dinner sets * Cutlery * Pots / Pans * Rugs * Sofa |

|  |  |
| --- | --- |
| **CATEGORY 6** | **Other:** these claims **may** be subject to Tax and Class 1A National Insurance contributions (NIC) |
| If The University has agreed and confirmed in writing to reimburse some other form of expenditure. Such reimbursements will be the exception rather than the rule and are solely at the discretion of The University. |