



TEMPORARY CHANGE OF BASE EXPENSES POLICY FOR DOCTORS AND DENTISTS IN TRAINING

Co-ordinator:

Lead of Review Group

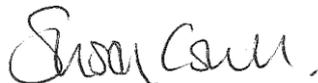
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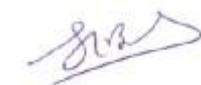
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Approver:

The joint BMA LNC

**Approved by joint
BMA LNC:**


Susan Coull



Simon Barker

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The provisions of this policy
applies exclusively to Doctors and Dentists in Training employed by NHS Grampian

NHS Grampian
Temporary Change of Base Expenses Policy
for Doctors and Dentists in Training

This document is also available in large print and other formats and languages, upon request. Please call NHS Grampian Corporate Communications on Aberdeen (01224) 551116 or (01224) 552245.

This Policy has undergone Equality and Diversity Impact Assessment.

Revision History:

Document Title	Policy Version	Date approved by GAPF	Review Date

NHS Grampian
Temporary Change of Base Expenses Policy
for Doctors and Dentists in Training

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NHS Grampian

Temporary Change of Base Expenses Policy for Doctors and Dentists in Training

1. Introduction

This Policy has been devised as a result of the introduction of the Lead Employer model in order to provide a mechanism for payment of expenses where a Doctor or Dentist in Training (DDiT) rotates to Placement Board for a temporary period of up to two years, which is further than a one hour commute from their current home.

DDiTs should not be financially disadvantaged as a result of reasonable costs incurred through a Training Programme rotation

No DDiT is expected to profit materially from reimbursements in respect of temporary change of base expenses, therefore applications for expenses will be subject to eligibility / status being confirmed. Total costs / reimbursements are subject to a ceiling of **£8,000**.

2. Scope

This policy applies equally to Doctors and Dentists in Training employed by NHS Scotland. For the purposes of this document and the sake of clarity Doctors and Dentists in Training are:

- Foundation Trainees
- Core Trainees
- Internal Medical Training Trainees
- Specialty Registrars

3. Roles and Responsibilities

DDIT is responsible for:

- Ensuring information within the temporary change of base application form is accurate and that expenses have not been claimed from another source.
- Obtaining a removal quotation with Pickfords plus another three companies, and only if the cost from another company is significantly cheaper would NHS Grampian reimburse removal from a company other than Pickfords.
- Claiming for temporary change of base expenses timorously; and before the end of the tax year following the date of the employee moving i.e by March of the following year.
- Attaching receipts for the expenses claimed along with the expenses claim form.
- Notifying NHS Grampian HR Service Centre that they are leaving NHS Grampian employment within two years of the date of taking up, and are therefore required to repay a proportion of the temporary change of base expenses claimed.

HR Department are responsible for:

- Assessing the temporary change of base application form to confirm there is a requirement for the DDiT to temporarily change base and the arrangements proposed, including location of new home are reasonable.
- Providing clarity to the DDiT on the level of assistance available under temporary change of base, and the expense reimbursement limits.
- Forwarding to the HR Service centre, the authorised temporary change of base application form.

The HR Service Centre is responsible for:

- Processing temporary change of base expenses, up to the maximum limit as highlighted on the application form by the HR department.
- Ensuring temporary change of base expenses are processed in-line with HR Revenue and Customs Taxation Criteria.
- Processing any repayment of temporary change of base expenses from a DDiT who is repaying a proportion of the amount reimbursed due to leaving NHS Grampian employment within two years of the date of taking up the post.

4. Temporary Change of Base Expenses Policy

4.1 Temporary Change of Base Principals

Paragraph 315 of Hospital Medical and Dental Terms and Conditions of Employment state:- Practitioners who are required to move house during a rotational training programme may receive reimbursement of removal expenses in accordance with Section 26 of the General Whitley Council.

However DDiTs who might be reimbursed for moving house in such circumstances may choose not to move home on taking up the second or subsequent posts in the rotation but to travel daily the greater distance between their home and the hospital. Usually excess travel is only paid if the commuting distance from home to hospital is up to one hour. Reference PCS(DD)2010/8 Relocation and Excess Travel circular for entitlements.

For placements undertaken in GP practices, the provisions contained in PCS (GPR) 2009/1 continue to apply. In these circumstances, NHS Education for Scotland (NES) will reimburse relocation and excess travel expenses and claims should be made directly to NES

Where Excess Travel is not an option the DDiT can claim expenses under this temporary change of base policy.

- Temporary change of base expenses will be reimbursed, only when the relevant HR manager is satisfied that the removal of the DDiT's home is required and the arrangements proposed, including location of new home are reasonable.
- NHS Grampian will indicate to the DDiT the level of assistance available under temporary

change of base regarding the aspects of removal costs that can be reimbursed including limits. This should be done prior to commitments being made.

- The temporary change of base expenses claimed must have been incurred by the applicant and evidenced by receipts. In addition, expenses which are claimed must not be recoverable, in full or in part, from another source e.g. through their partner's employer.
- Should a DDiT choose to leave NHS Grampian employment within two years of the date of taking up the post for which temporary change of base expenses were paid, a proportion of the amount reimbursed under the temporary change of base expenses provision will require to be refunded. Repayment will be proportionate to the part of the 2 years unfilled – see appendix 1

4.2 Benefits to Temporary Change of Base Expenses

A maximum of £8 000 (including Value Added Tax) can be claimed within the terms of this Policy. Please note, in line with Inland Revenue taxation rules, some temporary change of base expenses may be taxable.

All expense applications will approved by the human resource department and assistance will not exceed the expenses actually incurred by the DDiT. Temporary change of base expenses must be claimed timeously (and whilst trainee is an employee of NHS Grampian) and in any event by the end of the tax year following the date of the employee moving i.e by March of the following year.

All expenses will be contained within the £ 8,000 maximum allowance per temporary change of base application, which is on a pro rata basis dependant on duration of the placement.

Entitlement is limited to –

3 month placement	£1000
4 month placement	£1333
6 month placement	£2000
12 month placement	£4000
18 month placement	£6000
19-24 month placement	up to £7999.

4.3 Type of Temporary Change of Base Expenses Claims

NHS Grampian may meet elements of expenditure falling within the following:

Travel Costs – Direct travel costs of the DDiT, partner and dependant family members living with the DDiT in the new residence from their old home to new placement board area.

Removal Costs – Removal of household effects from the old home to new placement board area. Claims of up to £500 can be claimed on the condition Pickfords (NHS Grampian’s preferred supplier) is used. NHS Grampian will not reimburse the cost of lifting or relaying carpet or of moving special items such as gym equipment or pianos.

In the event the DDiT prefers to make their own arrangements for the transit of their belongings they will be eligible for reimbursement of the hire costs for a van or other suitable transport assuming the cost is lower than utilising Pickfords. Documentary evidence must be provided to Human Resources Service Centre of the cost of both options. In the event Pickford is unable to deliver this service, the trainee will still be reimbursed provided they can demonstrate they have tried to book Pickfords.

Accommodation – If incurring accommodation expenses in the old area at the same time as having moved to the new area, it is the DDiT’s choice if they elect to:-

- a) Apply for hospital accommodation, which will be provided if available. In this set of circumstances the cost of this will be offset against the DDiT’s allowance
- b) Rent in the private sector in the knowledge that reimbursement will only be made against receipted expenditure and up to maximum of the DDiT’s entitled allowance
- c) Where premises in the old area are rented out, financial assistance will not be given and the cost of accommodation in the new area (hospital or private) will be the responsibility of the DDiT.

Home Return Visits - When a DDiT temporarily changes base but continues to own a property in their previous placement board area, home visits will be paid, at second class rail fare, for two visits per month. If significant journey time/costs are involved, there will be discretion by the Director of Workforce to allow flexibility, e.g. one journey by air (economy class) air per month, within the overall stated assistance package

4.4 Removal Supplier Details

NHS Grampian has awarded Pickfords the contract to provide relocation services and domestic removal services from 01/04/2010.

This encompasses

Advice & support including legal services relating to sale, purchase, lease of residential property and the reservation / sourcing of temporary accommodation.

Pickfords require 10 working days notice prior to your intended relocation move

Named contacts

George Achikeh Tel 02031882620
 Freephone 0800 212 155
 george.achikeh@pickfords.com

Mhairi Anderson Tel 0141 336 2833
 mhairi.anderson@pickfords.com

Your HR Service Centre Expenses Contact will issue Pickfords with authorisation to facilitate your temporary change of base once your application has been **returned to NHS Grampian and approved**

Pickfords invoice NHSG direct to avoid the DDiT being out of pocket, up to their approved temporary change of base package limit. Costs will be met by NHS Grampian subject to the agreed temporary change of base package limits not being exceeded.

NHS Grampian have gone through a rigorous process to establish the value for money and quality of service that Pickfords offer, therefore NHS Grampian **will not** accept DDiT's own alternative removal company unless the cost from another company is significantly cheaper.

4.5 Application Process

The DDiT will complete the temporary change of base application form and submit this to the HR Department within their placement board. (See appendix 2)

The HR Department will assess the application for approval. If the application is approved the DDiT will be notified and the HR Department will forward the authorised application onto NHS Grampian HR Service centre.

The DDiT will be asked to claim for reimbursement by completing the temporary change of base Expenses Claim Form (appendix 3) and sending this to NHS Grampian HR Service Centre, Expenses Contact along with receipts. Attaching receipts will avoid necessary delay in reimbursement.

**PROPORTION OF TEMPORARY CHANGE OF BASE EXPENSES DUE TO BE PAID IF DDIT
LEAVES WITHIN 2 YEARS**

Number of 2 months served	Proportion of expenses due to be refunded
1	23/24th
2	22/24th
3	21/24th
4	20/24th
5	19/24th
6	18/24th
7	17/24th
8	16/24th
9	15/24th
10	14/24th
11	13/24th
12	12/24th
13	11/24th
14	10/24th
15	9/24th
16	8/24th
17	7/24th
18	6/24th
19	5/24th
20	4/24th
21	3/24th
22	2/24th
23	1/24th
24	nil

TEMPORARY CHANGE OF BASE APPLICATION FORM

SECTION 1

TO BE COMPLETED BY THE APPOINTEE

Surname: _____ Forename: _____

Training Programme: _____

Current Base: _____ New base: _____

Previous Bases (if applicable) within current training programme:

Dependants: YES / NO [delete as appropriate] Children under 16 years: YES / NO [delete as appropriate]

Will your dependants still be residing at your former address? YES / NO / N/A [delete as appropriate]

Telephone no: _____ Email: _____

Accommodation prior to moving base within the North Region [delete as appropriate]

- Owner occupier
- Rented – Furnished
- Rented – Unfurnished
- Hospital accommodation
- Residing with parents/family/friends

Continuing Financial Commitment

- | | |
|---|----------|
| 1. Do you own a property in the UK? | Yes / No |
| 2. Do you have continuing mortgage commitment on this property? | Yes / No |
| 3. Do you have continuing rental commitment on a home base property? | Yes / No |
| 4. Are you/will you be receiving ANY level of financial assistance via a formal or informal renting out agreement on 1) or 3) above while employed by NHS Grampian? | Yes / No |

If yes, please give details _____

Please supply proof of mortgage/rent commitment along with this form.

For Completion by all defined Training Grade Doctors.

This is my first full time appointment in the grade of:- Fixed Term Specialist Training Programmes (FTSTAs), Specialty Registrar to include LATs and LASs. Yes / No

I have already held appointment in one of these grades but have now transferred, on expiry of my contract, to a post in the same or lower grade for the purpose of gaining further experience Yes / No

DECLARATION - FOR COMPLETION BY ALL APPOINTEES

I declare that:

Expenses incurred by me which are reimbursable by NHS Grampian under the Short Term Removal/Relocation package are not recoverable in full or part from another source.

To the best of my knowledge and belief, all the information that I have given on this form is full and correct in every respect.

Signed: _____ **Date:** _____

**Thank you for completing this form. You should now return it to:
The appropriate Human Resources Team within 14 days**

TO BE COMPLETED BY HUMAN RESOURCES

Post: _____

Specialty: _____

Anticipated date of move: _____

Anticipated duration of placement: _____

Financial Limit £_____ maximum

Entitled to: [delete as appropriate]

- Journey to take up post
- Return visits to family home (max. 2 per month)
- Removal costs
- Accommodation

Authorised signatory: _____ **Date:** _____
(HR Manager authorisation up to £8,000)

