

Guidelines for Recruitment Expenses:

Interview Expenses

Removal Expenses

Relocation Expenses

This document should be used by Faculties/Services to process interview, removal and relocation expenses for grades 2-9. Guidance and advice can be sought from your central HR contact.

General guidance for the arrangement of interview panels is available on the Human Resources website

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Interview Expenses

Process:

- An interview expenses form can be completed by all those who attend an interview, though they will not usually be reimbursed to candidates who are already employed by the University, on main campus.
- The form should be completed and returned, along with supporting receipts, to the faculty/school/service where the interviews are held **by the 10th of the month, for payment at the end of that month.**
- The form should be checked in line with the guidelines (as on the form), also ensuring that the Bank details section has been completed and that the receipts correspond with the claim.
- The bank details given will indicate the currency that the claim is to be paid in. If a UK bank account is given and there are claims in another currency, they will need to be converted in to sterling. This principal will apply for an account given outside the UK where payment will have to be in that country's currency or EUROS. **The total claimed amount must reflect the currency that the payment is to be made in.**
- The account code should be entered onto the form, authorised and passed to the payments office for processing by the 16th of each month for payment by the end of that month, though foreign payments do get processed on a weekly basis.
- A copy of the form and the original receipts should be kept in the school/service for 6 years for auditing purposes and in line with usual financial procedures. Alternatively, these can be scanned and uploaded onto the e-recruitment system.

Notes:

- Travel and subsistence forms are for use by University of Leeds employees only and should not be used for interview expenses.
- Schools/services may adopt their own process whereby the completed forms are passed to faculty finance for approval prior to processing by the payments office.

Useful web links:

Interview expenses claim form: <http://www.leeds.ac.uk/hr/forms/recruitment/EXPENSE.doc>

Travel checker: <https://www.traveline.info/>

A currency converter can be found at: <http://www.xe.com/>

Removal Expenses

A removal expenses claim form should be used in line with the removal expenses policy available at <http://www.hr.leeds.ac.uk/policies/>. The policy also gives a full list of university approved removal companies following a tendering process (these are also listed on the Purchasing website at <http://www.leeds.ac.uk/purchasing/UoL/contracts/commodities/removals.htm>).

Process:

- The form should be given to new employees who qualify.
- The employee should obtain three quotes and indicate on the form which removal company they wish to move with (usually the cheapest). Quotes should include all insurances as standard.
- The employee must inform the removal company that they are or will be university staff, as the removal company will need to contact the faculty/school/service to confirm this information, as the payment is made by the faculty/school/service on the behalf of the employee.
- The arrangements for the move are then arranged between the removal company and the employee direct.
- When the removal company details have been confirmed and the quote accepted a purchase order needs to be raised via a SIPR. This number will then be corresponded to the removal company for it to appear on the invoice, which, when issued after the move has taken place, will go direct to the payments office for processing.

When the cost is over £5,000:

- If the cost is over £5,000 it is expected that the university would pay this and reclaim the difference from the employee.
- If an employee moves and then incurs storage costs or has a two part move, these costs will also have to be monitored to see if they will exceed the £5,000 limit.
- According to the policy the employee is expected to meet the additional costs, though faculties/schools/services are able to use their discretion to decide if they are willing to cover the whole cost.
- If the individual is required to repay the difference, it should be agreed locally how and when repayments should be made and it does not have to go through the payroll. If the employee pays by cheque, made payable to the University of Leeds, this should be processed in the usual way so that it is credited back into the account where the original cost was debited.



Notes:

- A claim should be made within 12 months of taking up the appointment. Though dependent on circumstances this can be flexible and discretion used.
- Depending where an employee is moving from it may not be the cheapest or the best option to use one of our approved users. In these situations discretion should be used and if necessary an outside company can be used.
- Some employees will do their own move as it may work out cheaper hiring a van, this is also acceptable and the costs can be reclaimed using the relocation expenses claim form.
- If an employee leaves within the first 2 years of employment the University has the right to claim some of the costs back – see the policy for the full details.
- Flights for new staff joining the university from overseas and their immediate family (i.e. spouse/partner and children) should be reimbursed in addition to the removal expenses and should not be included in the £5,000 budget. These can be reclaimed using the relocation expenses form. **These costs cannot be reclaimed if the employee leaves within the first 2 years of employment.**
- For university funded appointments of less than 2 years or appointments supported from outside funds, the university will not normally make a contribution towards removal expenses. However an *ex-gratia* payment may be made where special circumstances obtain and staff who wish to make a case for such a payment should write to the appropriate Faculty Dean or Head of Service.

Useful web links:

Removal expenses claim form: <http://www.leeds.ac.uk/hr/forms/>

Removal expenses policy: <http://www.hr.leeds.ac.uk/policies/UploadedFiles/RemovalExpenses.doc>

Purchasing website <http://www.leeds.ac.uk/purchasing/UoL/contracts/commodities/removals.htm>

Relocation Expenses

Relocation expenses are referred to in the removal expenses policy and cover costs incurred in addition to the fee charged by the removals company. For example, flights and expenses incurred by employees carrying out their own move (e.g. van hire).

Process:

- Where possible the details of the relocation should be agreed before arrangements are made.
- The individual should complete the relocation expenses form which has been designed for those who qualify for removals expenses but do not need to make a full claim (for example if doing their own move)
- The details from the removals expenses form should be transferred by HR onto an Authority for Payments form from Finance and processed in the normal way.
- The form should be checked in line with the guidelines in this document and ensuring that the bank details section has been completed and that receipts are attached and correspond with the claim.
- Any claim made in any other currency than Sterling will need to be converted into pounds. Relocation expenses can only be paid into a UK bank account,
- The Authority for Payments form can be passed to the payments office on a weekly basis.
- A copy of the form and the original receipts should be kept in the school/service for 6 years for auditing purposes and in line with usual financial procedures. Alternatively, these can be scanned and uploaded onto the e-recruitment system.

Notes:

- The university will reimburse in full the economy class fares for a new member of Academic and Academic-Related staff who are joining from overseas and all members of their immediate family (spouse/partner, children) who:
 - Accept a position for two years duration or more, which is university funded
 - Accept a position that has been advertised nationally (includes the university website and jobs.ac.uk)
- Expenses are normally paid only in respect of an initial appointment and must normally be claimed within 12 months of taking up the appointment.
- Flights in addition to the removals expenses should not be included in that £5,000 budget. These costs cannot be reclaimed if the employee leaves within the first 2 years of employment,

Useful web links:

Relocation expenses claim form: <http://www.leeds.ac.uk/hr/forms/>

Authority for Payment form: http://www.leeds.ac.uk/finance/standard_forms/standard_forms_2.html

A currency converter can be found at: <http://www.xe.com/>

INTERVIEW EXPENSES FORM

Before completion of this form please read the notes below. Please then complete in block capitals all sections and return to your interviewing Faculty/School/Department/Service. **The University reserves the right to refuse payment of claims which are not supported by receipts.**

Travel

Travel expenses from within the UK can be reimbursed up to a maximum equivalent to the standard return rail fare only. Journeys made by private car may be reimbursed at a rate of 25 pence per mile or the maximum equivalent to the standard return rail fare (whichever is the lower figure). Taxi, bus and underground fares and other incidentals of a journey will be reimbursed when circumstances justify the expenditure incurred, but taxis should only be used if cheaper transport is not practicable. Where previously agreed, economy class air fares and Standard class Eurostar tickets will be reimbursed.

Accommodation

Unless otherwise agreed the cost of overnight accommodation will **only** be reimbursed by the University if it is booked through your Faculty/Department/School/Service contact.

Meals

Reimbursement for food purchased during the time spent away from your home address or usual place of work, for the purpose of attending the interview, will be up to the following allowance. All claims must be supported by receipts:
5-10 hours = £15.00 per day or more than 10 hours = £25.00 per day.

Payment

All claims **must** be supported by receipts. Forms received by the 10th of each month will normally be paid by the end of the same month; forms received after this date will be paid by the end of the following month, please ensure that details are entered correctly as incorrect information will cause a delay. Interview expenses will not usually be reimbursed to candidates who are already employed by the University, on main campus. **Claims for less than £5 should be made on the day of your interview to the Interviewing Faculty/Department/School/Service and arrangements should be made for reimbursement as a cash payment.**

Full name:		Address in full:				
Telephone :						
E-mail:						
Bank name and address in full:						
Bank Sort-Code / Swift code / BIC / ABA Routing:						
Bank Account Number / IBAN number:						
Post interviewed for:			Job reference number:			
Faculty//Department/ School/Service interviews held:						
Date	Please provide sufficient details below			Sterling Amount		Amount – [Foreign Currency inc €'s]
				£	p	
	1. Rail Fares	From	To			
	2. Air Fares	From	To			
	3. Mileage	From	To			
	4. Accommodation	Details				
	5. Meals	Details				
	6. Other	Details				
Total claimed						

I certify that the expenses claimed on this form are correct. **Please ensure receipts supporting this claim are attached.**

Signature of claimant _____ Date _____

Please return your form to the Interviewing Faculty/Department/School/Service

FOR OFFICE USE ONLY	GL account: 52130	Tax code: 10
	Financial approval:	Cost object: _____
	Position: _____	Departmental/HR contact approval:
	Name: _____	Name: _____
Signature: _____ Date: _____	Signature: _____ Date: _____	



Removal Expenses Claim Form

Procedure

Staff entitled to claim for removal expenses (see Qualifying Criteria below) should approach the Faculty/Service Human Resources contact and then obtain quotes from the approved Contractors (details available at <http://www.leeds.ac.uk/purchasing/UoL/contracts/commodities/removals.htm>). You need to obtain 2 quotes for moves costing less than £1000 in value or 3 quotes for moves costing over £1000. **It is important that when obtaining quotes, individuals state that they will be joining the University of Leeds; otherwise you will be directly invoiced.**

The University will pay the lowest quoted figure, up to a maximum of £5000. Staff may choose to use a Contractor who provides a higher quote but will be expected to reimburse the University the sum of the difference of that and the lowest quote received.

The quotes should be sent, along with this completed form, to the Faculty/Departmental/Service contact who will make the arrangements for the University to be invoiced direct from the contractor. No cost should be incurred by the individual, unless you decide not to use the contractor who quoted the lowest figure.

Individual details

Full name: _____

Post appointed to: _____

Job reference number: _____

Start date at University of Leeds: _____

Faculty or Service details: _____

Removal Company details

Quotes obtained from and cost:

1. _____ £ _____

2. _____ £ _____

3. _____ £ _____

Please name any Contractor that you approached who did not contact you with a quote:

Preferred quote and cost: _____ £ _____

Amount to be reimbursed to the University if lowest quote not preferred: £ _____

Date of move: _____

Name the move is booked under if different from the employee's name: _____

Signed: _____ Date: _____

Qualifying Criteria

The University will contribute to removal expenses incurred by new members of Academic and Academic-Related staff who:

- accept a position for two years duration or more, which is University funded,
- accept a position that has been advertised nationally (this includes the University website and jobs.ac.uk),
- at the time of appointment (i.e. date of letter of appointment) live outside a radius of 25 miles from Leeds (LS2) and who move to within such a distance to take up the post.



Key Principles

For qualifying staff the University will reimburse the cost of moving **household effects only** (by surface freight), the cost of storage (up to a maximum period of six months) and insurance costs (while effects are in transit or storage). The costs must be reasonable and up to a maximum of £5,000.

In addition, new staff joining the University from overseas will receive full reimbursement of economy class fares for all members of the immediate family, i.e. spouse/partner and children. (See Relocation Claim Form)

Expenses are normally paid only in respect of an initial appointment and must normally be claimed within 12 months of taking up the appointment.

Reimbursement to the University

The University is entitled to recover removal expenses from all staff that, of their own volition, terminate their employment with the University within the first 2 years of their contract. However, the University will not seek to recover expenses from staff granted an ex gratia payment on a discretionary basis.

For full details of the scheme can be viewed at

<http://www.hr.leeds.ac.uk/policies/Default.aspx?PGId=10> and click on Removal Expenses

Office use

GL Account: 52130 Tax code: I0

Cost

object _____

Date contacted by preferred company requesting verification: _____

SAP purchasing completed: _____

Purchase Order

Number _____

Notes:

(For example storage payments and cost running total)



Relocation Claim Form

Staff entitled to claim for relocation expenses (see Qualifying Criteria below) should approach the Faculty/Service Human Resources contact and then complete this relocation claim form, handing it back to them along with supporting receipts. The reimbursement will be made directly into your bank account in pounds sterling; therefore any claim made in a different currency will be converted.

Please note that the Faculty/Service reserves the right to refuse payment of claims which are not supported by receipts.

Individual details

Full name: _____

Post appointed to: _____

Job reference number: _____

Start date at the University of Leeds: _____

Faculty or Service details: _____

Employee ID no.: _____

Bank details Sort code: ___ / ___ / ___ Account number: _____

Expense details

Please list below the expenses incurred, e.g. flights, car/van hire and train, indicate currency used by inserting in the appropriate column.

Date	Details	Amount Sterling £:p	Amount Other inc euros
Total Claimed			

I certify that the expenses claimed on this form are correct.

Signature of claimant: _____ Date: _____

Please ensure receipts supporting this claim are attached.

Qualifying Criteria

The University will reimburse in full, the economy class fares for all members of the immediate family, i.e. spouse/partner and children, to new members of Academic and Academic-Related staff when joining from overseas who:

- accept a position for two years duration or more, which is University funded,
- accept a position that has been advertised nationally (this includes the University website and jobs.ac.uk),

Expenses are normally paid only in respect of an initial appointment and must normally be claimed within 12 months of taking up the appointment.

Office use

GL Account: 52130 Tax code: I0

Cost object _____

Conversion to £: p: _____ Total: £ _____

Date authority for payment form completed: _____

Date form passed to Payments Office: _____

Payment due to be made: _____ Confirm payment due date with individual: _____