

FAQs – Relocation as at 24/05/2023

Q1. Can I backdate my travel and relocation claims to 5th August 2020, when I started?

A1. No, claims are eligible from the relevant implementation date, (please see paragraph 1 of the framework).

In this case, the implementation date for trainees who commenced training in August 2020, was 1st November 2020. Eligible claims could be made from that date onwards.

Implementation for all other (existing) trainees will be agreed on a region-by-region basis. Please refer to your employer if you have a question about the implementation date that applies to you.

Q2. Where a training programme includes placements outside of the local office or region which relocation policy applies?

A2. HEE has agreed a framework for the arrangement of payment of relocation and associated travel expenses for doctors, dentists and public health trainees in accredited HEE training programmes. However, it is the employer that is responsible for implementing the policy and administering claims and therefore trainees should liaise with their employer when making any claims.

Trainees should note that the framework only applies in England, if their training programme includes placements in the devolved nations they will need to follow the local policy.

Q3. I am training Less Than Full Time, meaning my programme will be longer than 8 years. How much can I claim?

A3: The maximum sum is based upon an assumption of 8 years reckonable service in any approved HEE training programme. Trainees who exceed this period of training (for example trainees whose CCT is awarded after completion of ST7/8 and trainees working less than full time) and who have exhausted the £10,000 maximum allowance will be entitled to continue to claim for excess mileage and/or removal expenses (paragraph 14).

The amount available over the £10,000 limit will be assessed on an individual basis, subject to the requirements of placements and personal circumstances, at the discretion of the Postgraduate Dean.

Q4. I have previously made Relocation claims up to the limit of £8,000. Can I continue to claim now that the budget limit has increased to £10,000?

A4: Yes, if you believe you are eligible, you can now submit a request for claims up to the remaining £2,000 of your allowance. Applications must relate to new expenses incurred from the Framework implementation date onwards (this will vary in each region). No retrospective or previously-rejected claims will be approved.

Q5. During my training, I have moved from region to region, am I entitled to reset the allowance and have a further GBP 10,000?

A5. No, the 10,000 is cumulative over entire period of PG Training from foundation to CCT.

Q6. Can a trainee who lives outside the HEE regional footprint claim excess mileage or temporary accommodation allowance?

A6. Yes, provided the majority of placements on their training programme are within reasonable commute from their home. This will be deducted from the maximum allowance. Eligibility for temporary accommodation for placements not within a reasonable commute would need to be agreed by the PG Dean on an individual basis, and will be taken from the trainee's maximum allowance.

Q7. Can a trainee claim in their final year of training for relocation costs (house sale costs, removals) when they have chosen to move closer to the placement hospital, but this was not required e.g. the rota does not include on-calls?

A7. There is no stipulation in the framework that negates relocation in the final year of training. However, any relocation should be clarified for eligibility prior to submission and if the employer assesses there is no requirement to move to fulfil clinical commitments, then this would not be supported. Trainees will not be expected to profit materially in relation to relocation and associated expenses. The trainee would still be eligible to claim any applicable excess mileage.

Q8. Are trainees who move regions as a result of an inter-deanery transfer eligible to claim relocation and associated travel expenses?

A8. Yes. Trainees who move as a result of an inter-deanery transfer are eligible for relocation and associated travel expenses, provided they have not exhausted their entitlement.

Q9. Are trainees on OOP eligible to claim and who pays?

A9. Trainees who are deemed to be out of programme (OOP) will not be eligible to claim relocation, temporary accommodation or excess mileage payments whilst they are out of programme but may claim expenses in order to support them returning to their training programme. **The exception to this is trainees on approved OOPT (Out of Programme for Training) experience.**

Trainees who are OOPT are eligible under this framework, providing they are working in an NHS setting within England. Eligible trainees should make claims via their employer.

Arrangements in the devolved nations would need to be agreed with the relevant provider.

A trainee on an OOPT in any non-NHS setting is NOT eligible under this framework.

Q10. Where a trainee is on an academic programme, such as a Clinical Lectureship, and employed by a Higher Education Institution are they eligible for relocation and associated travel expenses? If yes, how do they make a claim?

A10. As detailed in paragraph 9 of the framework, trainees on academic training programmes are eligible. Where a trainee is employed by a Higher Education Institution they should liaise with their regional/local office regarding the process to submit claims.

Q11. Can I claim for rail fares or season tickets?

A11. No, if you are using public transport for journeys, you can claim expenses based on the equivalent mileage at the reserve rate (paragraph 35). For trainees not on the 2016 contract, the public transport rate applies.

Q12. Can I claim reimbursement of taxi fares, from public transport hubs (e.g., railway stations) to the Trust or other placement site?

A12. No, if you are using taxis or public transport for journeys, you can claim expenses based on the equivalent mileage at the reserve rate (paragraph 35). For trainees not on the 2016 contract, the public transport rate applies.

Q13. Where a trainee travels to their place of work using public transport how do they claim expenses when receipts are not available?

A13. If you are using taxis or public transport for journeys, you can claim expenses based on the equivalent mileage at the reserve rate (paragraph 35). For trainees not on the 2016 contract, the public transport rate applies. Receipts are not required.

Q14. Can I claim reimbursement of any parking charges which have been incurred?

A14. No, under the Framework, (paragraph 34), trainees are not eligible to make a claim for the cost of parking.

Q15. Can a trainee who owns a property outside of the HEE regional footprint, with no intention of selling and the majority of their placements are not within a commutable distance, make a claim for temporary accommodation costs?

A15. No - the trainee is not entitled to claim in these circumstances, (please see paragraph 33).

Exceptional personal circumstances referred to in paragraph 33 are subject to the agreement of the Postgraduate Dean or nominated deputy.

Q16. Can I claim excess mileage to my first placement?

A16. Yes, provided you are eligible and your home to place of work is more than 17 miles each way and you are not on a single site training programme.

Q17. Will I be taxed on reimbursement of removal or rotational travel expenses such as mileage?

A17. Expenses used for removal/relocation are exempt from income tax as per the relevant HMRC guidance, however excess mileage claims may be subject to tax. Trainees should clarify their personal position with their employer. (Please see paragraph 15).

Further guidance is available on the HMRC website at <https://www.gov.uk/expenses-and-benefits-relocation>.

If you have any queries regarding tax please speak directly to your employer and/or HMRC as none of the team at Health Education England, are qualified to provide advice on tax or national insurance contributions.

Q18. What constitutes 'accommodation' costs?

A18. Accommodation costs is rental costs only. It does not include any other related costs such as utility bills and council tax.

Q19. What is the current mileage rate? Is it still 28p/24p pre 2016 contract?

A19. All trainees are on NHS T & Cs now so the rate is standardised – for full details see [link](#). The exception is any trainee who is on pre-2016 T&Cs where different rates will apply.

Q20. Are trainees appointed to single-site training programmes eligible to claim excess mileage?

A20. No, trainees on single-site training programmes are not eligible to claim excess mileage. They are expected to live within a reasonable commute (less than 20 miles) of the place of work.

Q21. Where a trainee works night shifts and is concerned about their health & wellbeing, are they eligible to claim temporary accommodation, where the travel from principal place of work to home is excessive.

A21. Yes, the cost of reimbursement for temporary accommodation is part of the maximum relocation allowance and will need to be agreed prospectively with the employer.

Please refer to paragraph 40 of the framework

The maximum allowable costs are outlined in Appendix 3: Temporary accommodation allowance rates.

Q22. If a trainee following a night on-call is not able to drive home as it is deemed unsafe, is the Trust responsible for providing appropriate rest facilities and covering related costs?

A22. This is the employer's responsibility and is not part of the relocation framework.

Please refer to schedule 13, paragraph 10 of the Terms and Conditions of Service for NHS Doctors and Dentists in Training (https://www.nhsemployers.org/system/files/media/NHS-doctors-and-dentists-in-training-eng-tcs-v9_0.pdf)

Q23. Where the employer requires a trainee to undertake work away from the principal placement, e.g. a community based clinic, are trainees entitled to claim for standard business rate from base to community clinic?

A23. This is the employer responsibility and is not part of the relocation framework. Please see Section 17: Reimbursement of travel costs in the [NHSE Terms and Conditions of Service Handbook](#)

Q24. Please could you clarify the statement that the maximum excess mileage claim of 53 miles each way per day but a total journey of 70 miles each way?

A24. The 53 miles maximum excess mileage claim is because there is a deemed reasonable daily commute of 17 miles each way before excess mileage can be claimed and an overall "safe" each way journey of 70 miles. So, if you deduct the 17 miles from the 70 miles you get 53 miles maximum claim. Travelling further than 70 miles each way needs to be agreed by the employer and the PG Dean.

Example: Home to trainees principal place of work is 70 miles each way. The trainee is eligible to claim for 53 miles each way, because $70-17=53$.

Q25. As an employer when approving applications referring to relocation, how would I know if the trainee's post lasts a minimum of 2 years?

A25. Most training programmes are a minimum of 2 years. You may be able to view the programme or curriculum end date on TIS.

Q26. I am a trainee who has been recruited to F2 Standalone Training programme and am relocating to England from overseas. May I submit a claim under the framework for travel/relocation costs from point of entry to my training programme destination?

A26. The framework states:- Provided trainees meet the criteria to relocate to take up appointment of a training post which lasts a minimum of two years or who have to rotate to different geographical areas as part of their training programme they may make a claim. So, if the training programme is less than 2 years and there is no requirement to relocate to different geographical areas then you are not eligible. If your training programme is in a different region to the one where your UK port of entry is located and more than 70 miles from port of entry then you are eligible to claim. You can claim these travel expenses based on the mileage at the reserve rate of 28p per mile.

Q27. I am a trainee relocating from Wales. Are my previous excess travel expenses and legal costs taken from the allocated £10k?

A27. Any reimbursements take effect from the border between England and Wales. You would not be expected to take any costs, which were incurred in Wales, from your £10k, only costs that were incurred from your point of entry into England.

Q28. What financial assistance is available where a trainee is required to undertake a short placement out of region to gain a competence / capability that is not available locally.

A28. There may be tax implications when undertaking a short placement out of region. Such placements may be undertaken as an honorary attachment / secondment in a Trust outside of the training programme's geographical footprint and the trainee should discuss with their local office what the arrangements are to undertake such a placement, including the financial assistance available which is not covered by the relocation framework.

Q29. I am a trainee who has been recruited to F2 Standalone Training programme and am relocating to England from overseas. May I submit a claim under the framework for travel/relocation costs from point of entry to my training programme destination?

A29. The policy states:- Provided trainees meet the criteria to relocate to take up appointment of a training post which lasts a minimum of two years or who have to rotate to different geographical areas as part of their training programme they may make a claim. If your training programme is in a different region to the one where your UK port of entry is located then you are eligible to claim. You can claim these travel expenses based on the mileage at the reserve rate (see paragraph 35).

Q30. Can a postgraduate doctor or dentist who has previously owned and sold a property, and then relocates, be considered as a first-time buyer?

A30. In line with the Government definition of a first-time buyer, a first-time buyer would not apply to a postgraduate doctor or dentist who has previously owned a property.

Q31. Can a trainee claim expenses for both relocation and excess travel?

A31. Yes, but please refer to paragraph 22 of the framework and the requirement to be within a 'reasonable commute' of the majority of the anticipated prospective hospitals / placements on the training programme to be eligible for relocation expenses. If your place of work then exceeds 17 miles each way you may claim

excess mileage. Both relocation and excess mileage claims will be subject to the maximum expenses limit of £10,000.

Q32. Can a trainee claim for travel expenses and temporary accommodation expenses?

A32. Please refer to paragraph 39 of the Framework. Travel expenses would not be paid on top of temporary accommodation expenses save for one journey to and from home each week.

Q33. When searching for new accommodation (appendix 2 of the framework) can I claim a total of four nights' accommodation and subsistence or four nights per preliminary visit

A33. It is a total of four nights whether consecutive or split

Q34. What is the rate for overnight accommodation as part of the search for new accommodation

A34. HEE will make a contribution in line with appendix 2 of the framework and in accordance with the NHS terms and conditions of service handbook

Q35. Will travelling expenses for trainees and their dependents be reimbursed in full when incurred on removal from the old accommodation to the new property accommodation (appendix 2 of the framework) and does this also apply to hiring of vehicles?

A35. Travelling expenses will be reimbursed in full in this situation. The cost of a hire vehicle may be reimbursed provided it is for the purpose of relocating to the new property.

Q36. Are trainees only eligible to claim continuing commitments (appendix 2 of the framework) if they own the original property?

A36. Yes, they must own the original property

Q37. Is Dublin counted as an overseas location?

A37. The framework states all removal and associated expenses will be reimbursed from UK port of entry only, with the exception of the Isle of Man and Jersey for those trainees appointed to a training programme which includes one or more rotations to these locations. There is no exception for the Republic of Ireland

Q38. Is there a time limit between selling a property and purchasing a new one?

A38. There is a 12 month time limit

Q39. What financial assistance is available where a trainee is required to undertake a short placement out of region to gain a competence / capability that is not available locally.

A39. Such placements may be undertaken as an honorary attachment / secondment in a Trust outside of the training programme's geographical footprint and the trainee should discuss with their local office what the arrangements are to undertake such a placement, including the financial assistance available which is not covered by the relocation framework

Q40. How do I claim for one return visit to an old property to supervise the removals.

A40. Doctors in training are entitled to an additional day as paid leave, by their employer, to oversee the removal from their old property. This is in addition to annual leave and special leave entitlement. Subsistence will be reimbursed and mileage should be claimed at public transport rate/ standard rail fare. Trusts may require proof of the request.

Q41. Is HEE looking at its excess travel policy following increase of fuel costs and travel?

A41. The rates of reimbursement for excess travel in the Terms and Conditions of Service for NHS Doctors and Dentists refers to Section 17 of the NHS terms and Conditions of Service Handbook which apply to all staff directly employed by NHS organisations and sets the rates of reimbursement. Individual Trusts may have taken an internal view to increase reimbursement costs, however this is not subject to any national agreement.

Q42. Can a doctor in training who is working less than full time claim temporary accommodation expenses in lieu of excess travel under para 14 of the framework?

A42. Eligibility for temporary accommodation expenses does not differ between full time and less than full time doctors in training. Please refer to para 39 of the framework. If a less than full time doctor has exhausted their maximum allowance they should refer to para 14 of the framework to consider if they are eligible for additional financial assistance.

Q43. Is there any guidance on how excess mileage calculations should be made?

A43. There are a variety of on line tools to calculate the distance. The NHS Terms and Conditions doesn't specify a tool for calculating mileage however we would expect

Doctors in Training to take the shortest and most cost effective approach when claiming, unless there are exceptional reasons.

Q44. Can a doctor in training claim for excess mileage when they are already living within the region?

A44. If they live in region and the commute to work is in excess of 17 miles they are able to claim excess mileage. If they live OUT of region they are unable to claim excess mileage without Dean's discretion, please refer to para 33 of the framework.

Q45. Can doctors in training who are moving from rented to rented accommodation claim for storage costs?

A45. No – they are not able to claim; the framework is clear and no other expenses will be reimbursed

Q46. Who does para 21 of the framework apply to?

A46. If a MOD doctor in training is relocated to a different part of the country it would not come out of the £10,000 allowance

Q47. Are GRID doctors in training expected to live in the region which manages their programme or is living within a reasonable distance of some of their placements sufficient for them to claim?

A47. GRID doctors in training are the exception to the rule in that management of the training programme transfers to the appointing region to allow them to undertake sub-specialty training. Where a programme rotates across regional boundaries the decision will be taken by the programme lead. Para 33 of the framework refers to Dean's discretion to provide financial assistance on the grounds of exceptional personal circumstances.