

AGENDA FOR CHANGE LOCAL TERMS AND CONDITIONS HANDBOOK

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Contents

Section 1		Page
1.1	Introduction	5
1.2	Car Mileage Reimbursement	5
1.3	Bicycle Allowance	5
1.4	Annual Season Ticket Loan	5
1.5	On-Call enhancements	5
1.6	Out of Hours Allowances	5
1.7	Recruitment and Retention Premia	5
1.8	Subsistence Allowances	6
1.9	Telephone Expenses	6
1.10	Contractual Notice Periods to be given by staff to the PCT	6
Section 2 Car User, Bicycle and Public Transport User Allowance Information		
2.1	Introduction	7
2.2	Principles	7
2.3	Car Users	8
2.4	Cyclists	9
2.5	Annual Season Ticket	11
Section 3		
3.1	Introduction	13
3.2	Working outside normal hours	13
3.3	Part Time Staff and Other Staff working Non- standard hours	14
3.4	Staff working rostered overtime	15
3.5	Self Rostering Schemes	15
3.6	Annual Hours	15
3.7	Bank Staff	15
3.8	Unforeseen changes	15
3.9	On call and Other Extended Service Cover	16
3.10	Pay Enhancements for On Call	16

3.11	On call payments for part time staff or other staff working non standard hours	16
3.12	Employees called into working during an on call period	17
3.13	Other arrangements	18

Appendices

Appendix 1	Authorisation of Car Users Form	19
Appendix 2 Page 1	Agreement for Purchase of Bicycle and Equipment Form	20
Appendix 2 Page 2	Bicycle Claim Form	21
Appendix 3	Authorisation of Cycle Users Form	22
Appendix 4 Page 1	Season Ticket Loan Agreement	23
Appendix 4 Page 2	Application for Annual Season Ticket Loan	24

Section 1

1.1 Introduction

This document contains the local Agenda for Change terms and conditions of service for the organisation to use in conjunction with the National Terms and Conditions Handbook. In the event of perceived contradiction between local and national terms and conditions, the national terms and conditions will take preference.

This handbook is always subject to any national, London wide or locally agreed revisions. Further advice should be sought from Human Resources if required.

1.2 Car Mileage Reimbursement

Please refer to Section 2 on page 6 of this policy.

1.3 Bicycle Allowance

Please refer to section 2.3.2 on page 10.

1.4 Annual Season Ticket Loan

Please refer to section 2.3.3 on page 12.

1.5 On-call enhancements

Existing Whitley arrangements will continue until further national guidance has been received.

It should be noted that on-call arrangements only apply to a small number of staff principally physiotherapists.

1.6 Out of Hours Allowances

Following further discussion by the NHS Staff Council, the existing Whitley arrangements will apply until further notice. The PCT will continue with Whitley Out of Hours Allowances arrangements until new national arrangements have been agreed and finalised.

A local policy for Out of Hours Allowances was drafted and will be updated and ratified when national guidance has been issued. This is detailed in section 3.

1.7 Recruitment & Retention Premia

The Pan London Agenda for Change Reference Group and the London SHRINE have updated a pan London agreement on the payment of recruitment and retention premia. North West London sector have produced a policy for the application and agreement of recruitment and retention premia in line with the pan London agreement that all organisations in the North West sector are to sign up to. These documents are attached for reference.

Should there be a Hounslow proposal to implement recruitment and retention premia we have to apply the NW Sector policy and criteria, inform colleague organisations of our intentions and have the proposal ratified by the pan London reference group. This process remains in force subject to a Pan London review in March 2007.

1.8 **Subsistence Allowances**

The national terms and conditions allow for a designated manager to provide £15 per person towards an evening meal if staff whose normal working hours are day time hours – e.g. 9am to 5pm have been requested to work after 7pm. Examples of staff groups where this allowance may apply are finance staff at year end reconciliation or IT staff who need to complete night time maintenance work. It will be for the Director of the staff affected to approve this payment and find the resources to meet the costs.

1.9 **Telephone Expenses**

Reimbursement of telephone expenses is in accordance with the mobile phone policy ratified by the Board in July 2004.

1.10 **Contractual notice periods to be given by staff to the PCT**

Contractual notice periods to be given by staff when leaving the PCT are as follows:

Bands 1-5:	1 month notice
Bands 6&7:	2 months notice
Bands 8&9:	3 months notice

Section 2

CAR USER, BICYCLE AND PUBLIC TRANSPORT USER ALLOWANCE INFORMATION

2.1. Introduction

The aim of the procedures in this document are to:

- Reduce reliance on the car through the length and number of motorised journeys, in particular, those journeys carried out in single occupancy vehicles.
- To promote the use of alternative means of travel which are more sustainable and environmentally friendly.

This document explains the details of the eligibility criteria and the process for claiming allowances.

2.2. Principles

2.2.1 All staff will be assessed according to the prime mode of travel that they choose for **business use only**, and may be eligible for **one** of the following regular allowances:

Prime Mode of Transport for Business Use	Allowances staff may be eligible for (in agreement with Line Manager)
Car	Regular or Standard Car User
Cycling	Regular Cyclist Allowance or Cyclist Mileage Rate
Public Transport	Season Ticket Loan

2.2.2 In addition to the main allowances named above, staff may be eligible to use pool cars or acquire a lease car, depending on individual circumstances and in agreement with managers.

2.2.3 The final decisions about eligibility for allowances lie with managers. A managers prime consideration will be the most efficient means of travelling in terms of both cost and productivity.

2.2.4 It is the responsibility of the managers to keep a record of the travel patterns of their staff and ensure the immediate notification to travel patterns and allowances in the appropriate manner.

2.3. Car Users

2.3.1 Regular Car User Allowance

Staff are eligible to apply for *regular car user* allowance, if they meet one of the following criteria:

- (a) Travel an average of more than 3,500 miles per year, or,
- (b) Travel an average of at least 1,250 miles per year and necessarily use their car an average of 3 days per week, or,
- (c) Travel an average of at least 1,000 miles per year and spend an average of at least 4 days per week on such travel (Business Use Only).

The *regular user* allowance is a set amount paid monthly over a 12-month period with an additional payment made for the miles travelled which is set according to the cc of the car.

Regular car payments are:

Engine Capacity	Up to	1001 to	Over
	1000cc	1500cc	1500cc
Lump Sum	£508	£626	£760 per annum
Up to 9000 miles	27.0p	33.5p	40.0p
Thereafter	16.2p	18.3p	20.5p

2.3.2 Standard Car User

Staff who use a car as their prime method of transport at work, but do not meet the eligibility criteria for regular car user will be entitled to the *standard car* users mileage rate. The amount you receive depends on the cc rating (engine size) of the car used.

Standard car payments are:

Engine Capacity	Up to	1001 to	Over
	1000cc	1500cc	1500cc
Up to 3.500 miles	34.0p	43.0p	53.0p
Thereafter	16.2p	18.3p	20.5p

(based on Agenda for Change Terms and Conditions Handbook 2005)

2.3.3 Insurance

Both regular and standard car users are required to insure their car appropriately for work purposes.

2.3.4 Part time staff

- Are eligible for the *regular car user* allowance, provided they meet the mileage criteria.
- Are eligible for *standard car users* mileage rate.

2.3.5 Bank staff

- Are **not** eligible for the *regular car user* allowance.
- Are eligible for *standard car users* mileage rate.

2.3.6 Regular car users may also be entitled to the following travel allowances in agreement with their manager:

- Public transport costs, if it is agreed with their manager that this is the most efficient means of travelling.
- Cost of taxis if in exceptional circumstances this is the most efficient means of travelling.

2.3.7 Claiming Car User Allowance

In order to apply to become a Standard/Regular car user the application form enclosed in this policy (Appendix 1), must be completed and returned to the Human Resources Department. Eligibility for these allowances needs to be reviewed periodically by managers.

2.3.8 Claims

Both regular and standard car users should continue to submit claim forms to Pay Bureau, Jubilee Lodge, c/o Bournewood House, St Peters Hospital, Guildford Road, Chertsey, Surrey KT16 0QA. These forms should be submitted on at least a monthly basis and no longer than 3 months after the travel occurred/

2.4 Cyclists

2.4.1 Staff are eligible for cycling allowances if they cycle as their prime means of transport at work and travel an average of two journeys a day for work purposes.

2.4.2 All staff who claim any type of cycling allowance must insure their bike for public liability. Research has shown that for the Hounslow area this costs between £41 - £70 per year dependent upon the bike and type of coverage requested (2007 estimates).

2.4.3 Staff who use their own cycles for work purposes will be entitled to one of the following cycle allowances:

1. £150 allowance per year (regular cyclist allowance) towards the cycle maintenance costs. To be eligible to claim this allowance

you must cycle at least 750 miles per year (business use only). If you cycle less than 750 miles per year this would incur taxable liability, **or**

2. Cycle mileage allowance at a rate of 13.2p per mile, which is not taxable.

To apply for either of the above cycling allowances Appendix 3 must be completed and managers approval obtained. This form should then be submitted to the Human Resources Department.

- 2.4.4 Staff without their own bicycle can apply for a **one-off payment** of up to £150 towards the purchase of a bicycle and a **one off claim** of up to £75 towards the cost of equipment. Appendix 2 must be completed by the staff member and their manager must approve the payments. The form should then be submitted to the Human Resources Department.

After a 1 year period has passed staff can then claim either of the above allowances.

Should a staff member leave within a year of claiming either of the one off payments then they will be expected to refund the PCT on a pro rata basis (i.e. leaving the PCT 2 months after claiming will result in 10/12ths of the money claimed having to be paid back).

Copies of the relevant forms will be sent to Finance for their records.

2.4.5 Part time staff

Part time staff will be eligible for:

- The regular cyclist allowance on a pro rata basis.
- Cycle mileage allowances.

2.4.6 Bank staff

Bank staff will be eligible for cycle mileage allowances.

2.4.7 Additional allowances

Cyclists may also be eligible for the following additional travel allowances in agreement with their line manager:

- Current *standard mileage* rates detailed under Agenda for Change if this is the most efficient means of travel. Staff who are claiming the regular cyclist allowance **cannot** also be registered as a *regular car user*, but can be registered as a *standard car user* to receive a mileage allowance appropriate for the cc of their car.
- Public transport costs if this is the most effective means of travel and they do not have a season ticket.
- A ticket zone extension if this is the most efficient means of travelling and they are required to travel outside the zones of their season ticket.

- Re-imbursed for the cost of taxis if this is the most efficient means of travelling. This would usually be if the journey is urgent and there is no adequate public transport available.

2.4.8 Claiming allowances

Cycle Purchase

Claims for an allowance for the purchase of a bicycle and equipment should be made on the bicycle agreement and claim forms. The agreement form (Appendix 2 Page 1) must be completed prior to the purchase of the bicycle and no expenditure should be undertaken by the staff member until their manager has approved the form. Once approved the staff member may then purchase the bike.

Proof of purchase (receipts) must be attached to the bicycle claim form (Appendix 2 Page 2) and this form must be authorised by the manager in order to receive reimbursement towards the cost incurred. Appendix 2 (both pages) should be sent to Human Resources. Payment will be made to staff via their salary. Both the one off payment of up to £150 towards the purchase of a bicycle and the one off claim of up to £75 towards the cost of equipment are subject to Tax and National Insurance deductions.

Cycle Mileage Claims and Cycle Maintenance Allowances

Claims for either the mileage allowances or the cycle allowance should be made on a PCT claim form stating the journeys and the mileage to be claimed. The claim for the £150 cycle allowance should be made on a monthly basis (e.g. £12.50 claimed every month) otherwise it will not be paid. The forms should be sent directly to Pay Bureau, Jubilee Lodge, c/o Bournemouth House, St Peters Hospital, Guildford Road, Chertsey, Surrey KT16 0QA and clearly marked cycle allowance.

2.5 Annual Season Ticket

2.5.1 Staff are eligible for a season ticket loan if they meet either or both of the following criteria:

- Use public transport as their prime mode of travel for work purposes.
- Use public transport to travel to and from work.

2.5.2 Purchasing an annual season ticket will allow staff to currently secure a 12% reduction on monthly season tickets (an annual season ticket costs the equivalent of 10 monthly season tickets). The value of the season ticket loan will vary at a maximum will be the cost of the season ticket from home to permanent work base.

2.5.3 If staff leave the employment of the PCT during the 'life' of the season ticket, staff will be liable to pay the current £5 administrative fee charged by London Transport to obtain a refund for the element of the ticket

which remains unused. Staff who choose a season ticket loan will be expected to use their ticket for work purposes wherever possible.

2.5.4 Part time staff

- Are eligible for the season ticket loan.

2.5.5 Bank staff

- Are not eligible for the season ticket loan.

2.5.6 Additional allowances

Public transport users may also be eligible for the following additional travel allowances in agreement with their manager:

- Current car mileage rates detailed under the Whitley Council if this is, on Occasions, the most efficient mode of travel.
- Ticket zone extension if this is the most efficient means of travelling and staff are required to travel outside the zones of their annual travel card. Staff are only entitled to claim for 'excess fares' i.e. for journeys that are not covered by travel card.
- Cost of taxis if this is the most efficient means of travelling. This would usually be if the journey is urgent and there is no adequate public transport available.

2.5.7 Public transport users may also use the following methods of transport with the agreement of their manager for which no payments of allowances will be made:

- Pool car if this is the most efficient means of travelling.

2.5.8 Agreement and application for season ticket loan

An application form for the annual season ticket loan (Appendix 4) needs to be completed and returned to the Human Resources Department. The loan is given in accordance with the Season Ticket Loan Agreement. A copy of the application form will then be passed to the Finance Department who will issue the cheque. In addition, a change of circumstances form must be completed detailing how much each month is to be deducted from salary and the duration of the deductions (i.e. start and finish dates), the form should be signed by both the manager and the staff member. This should be submitted along with Appendix 4 to Human Resources. Deductions from salary should commence in the first month after receipt of the loan.

Section 3

OUT OF HOURS POLICY

3.1 Introduction

This policy has been produced in conjunction with the Agenda for Change, Terms and Conditions of Service Handbook.

3.2 Working Outside Normal Hours

- 3.2.1** Pay enhancements as set out in Table 1 below will be given to staff whose working pattern in standard hours, but excluding overtime and work arising from on call duties, is carried out during the times identified below:

For staff in pay bands 1 to 7 any time worked before 7:00am or after 7:00pm Monday to Friday; and any time worked on Saturdays, Sundays or Bank Holidays.

For staff in pay band 8 any time worked before 7:00am or after 10:00pm Monday to Friday; anytime worked before 9:00am or after 1:00pm on Saturdays and Sundays, and any time worked on Bank Holidays.

- 3.2.2** The pay enhancement will be based on the average number of hours worked outside these times during the standard working week, and will be paid as a fixed percentage addition to basic pay in each pay period. The enhancement will be pensionable and count for sick pay, but will not be consolidated for purposes of overtime or any other payment. Once the average has been agreed, the payment will not normally change because of small week to week variations in the shifts worked. It will, however, be re-calculated if there is a significant change in working pattern.

- 3.2.3** This average will be calculated over a 13 week reference period or over the period in which one cycle of the rota is completed, whichever most accurately reflects the normal pattern of working. For the purposes of the calculation short meal breaks taken during each work period will be included. An eight-hour shift from 3:00pm – 11:00pm would therefore include for qualifying hours for staff in pay bands 1 to 7, irrespective of when in that period a meal break was taken.

- 3.2.4** The enhancement will be paid as a percentage of basic salary each month, subject to a maximum of 25% for staff in pay bands 1 to 7 and 10% in pay band 8. Basic salary for these purposes will be regarded as including any long-term recruitment and retention premium. It will not include short-term recruitment and retention

premia, high cost supplements, or any other payment.

- 3.2.5** Where the average exceeds five hours a week during the times set out above, there will be a banded system of pay enhancements. The payment will not vary unless the working pattern changes sufficiently to take the number of qualifying hours outside the band over the reference period as a whole.

Table 1 - Enhancement for Working Outside Normal Hours

Average Unsocial Hours	Percentage of Basic Salary	
	Pay bands 1-7	Pay band 8
Up to 5	Local Agreement	Local Agreement
More than 5 but not more than 9	9%	9%
More than 9 but not more than 13	13%	10%
More than 13 but not more than 17	17%	10%
More than 17 but not more than 21	21%	10%
More than 21	25%	10%

- 3.2.6** Where unsocial hours working is limited or very irregular (averaging no more than five hours a week over the reference period) pay enhancements should be agreed locally. These may be fixed or variable, and based on actual or estimated hours worked, subject to local agreement. To ensure fairness to staff qualifying under the national rules set out above, locally agreed payments may not exceed the minimum percentage in the national provisions.

3.3 Part-Time Staff and Other Staff Working Non-Standard Hours

For part-time staff and other staff working other than 37½ hours a week excluding meal breaks, the average number of hours worked outside the normal hours should be adjusted to ensure they are paid a fair percentage enhancement of salary for unsocial hours working.

This will be done by calculating the number of hours which would have been worked outside normal hours if they had worked standard full-time hours of 37½ hours a week with the same proportion of hours worked outside normal hours. This number of hours is then used to determine the appropriate percentage in Table 1 above.

3.4 Staff Working Rostered Overtime

Where staff work shifts which always include a fixed amount of overtime (rostered overtime), the hours worked outside normal hours should be calculated as if they were working non-standard hours in excess of 37½ hours a week (paragraphs 2.7 and 2.8 above).

3.5 Self-Rostering Schemes

Where staff have agreed self-rostering arrangements with their employer, local provisions should be agreed to ensure that the enhancements payable under these types of provisions are shared fairly between members of the team.

In these cases, employers and staff representatives should agree the level of payment appropriate for the team, on the basis of the unsocial hours coverage needed to provide satisfactory levels of patient care. This should be based on the period covering a full rota or, where there is no fixed pattern, an agreed period of not less than 13 weeks activity for that team and divided between team members subject to a formula, which they agree.

3.6 Annual Hours and Similar Agreements

Agreement should be reached locally on pay enhancements for staff on annual hours agreements who work outside normal hours. The agreement should respect the principles of this Section to ensure that the arrangements for these staff are consistent with those for other staff working outside normal hours.

3.7 Bank Staff

Work for a staff bank run by the employer should be treated as a separate contract for the purpose of these rules and any additional payment due calculated as a percentage of their bank earnings, based on the number of bank hours worked outside normal hours.

3.8 Unforeseen Changes to Agreed Patterns of Working

Local employers and staff representatives, working in partnership, should develop protocols which ensure sensible planning for unexpected absence (such as the use of first on-call rotas for overtime) and minimise the need for frequent or sudden changes to agreed normal working patterns.

However, where it is necessary for employers to ask staff to change their shift within 24 hours of the scheduled work period, such staff should receive an unforeseen change payment of £15 for doing so. The payment is not applicable to shifts which staff agree to work as overtime, or that they swap with other staff members. Employers and staff representatives may agree additional payments locally if these are considered necessary to provide cover on public holidays.

Good management practice should ensure that this type of payment is not used where absence is predictable e.g. to cover maternity leave, long-term sick leave, planned annual leave etc. Appropriate monitoring of these payments should be undertaken at both a local (e.g. ward) and strategic (i.e. board) level in the organisation to identify circumstances which would suggest excessive or unusual trends for such payments.

3.9 On-Call and Other Extended Service Cover

An employee who is required to be available to provide on-call cover outside their normal working hours will be entitled to receive a pay enhancement. This enhancement recognises both their availability to provide cover and any advice given by telephone during periods of on-call availability.

This enhancement will be based on the proportion of on-call periods in the rota when on-call cover is required. The on-call period in each week should be divided into nine periods of at least twelve hours. The enhancement for an individual staff member will be based on the proportion of these periods in which they are required to be on-call, as set out in paragraphs 2.23 to 2.28 and Table 2 below.

3.10 Pay Enhancements for On-Call Cover

3.10.1 An enhancement of 9.5% will be paid to staff who are required to be on-call an average of 1 in 3 of the defined periods or more frequently.

3.10.2 An enhancement of 4.5% will be paid to staff who are required to be on-call an average of between 1 in 6 and less than 1 in 3 of the defined periods.

3.10.3 An enhancement of 3% will be paid to staff who are required to be on-call an average of between 1 in 9 and less than 1 in 6 of the defined periods.

3.10.4 An enhancement of 2% will be paid to staff who are required to be on-call an average of between 1 in 12 and less than 1 in 9 of the defined periods.

3.10.5 For these purposes, the average availability required will be measured

over a full rota, or over a 13 week period if no standard pattern is applicable.

- 3.10.6** Where on-call cover is limited or very irregular (averaging less than 1 in 12) pay enhancements will be agreed locally. These may be fixed or variable, and based on actual or estimated frequencies of on-call work done, subject to local agreement. To ensure fairness to all staff qualifying under the national rules set out above, locally agreed payments may not exceed the minimum percentage in the national provisions.
- 3.10.7** Where on-call payments apply to staff in receipt of a long-term recruitment and retention premium the on-call enhancement should be calculated taking account of both basic pay and the applicable long-term recruitment and retention premium.

Table 2 - On-Call Enhancements

Frequency of On-Call	Value of Enhancement as Percentage of Basic Pay
1 in 3 or more frequent	9.5%
1 in 6 or more but less than 1 in 3	4.5%
1 in 9 or more but less than 1 in 6	3.0%
Between 1 in 12 or more but less than 1 in 9	2.0%
Less frequent than 1 in 12	By local agreement

3.11 On-Call Payments for Part-Time Staff or Other Staff Working Non Standard Hours

For part-time staff and other staff working other than 37½ hours a week excluding meal breaks, the percentage added to basic pay on account of on-call availability will be adjusted to ensure that they are paid a fair percentage enhancement of salary for on-call working. This will be done by adjusting the payment in proportion to their part-time salary so that they receive the same payment for the same length of availability on-call as full-time staff.

3.12 Employees Called Into Work During an On-Call Period and Who Respond to a Call by Phoning From Home

- 3.12.1** Employees who are called into work during a period of on-call will receive payment for the period they are required to attend, including any travel time. Alternatively, staff may choose to take time off in lieu. However, if, for operational reasons, time off in lieu cannot be taken within three months the hours worked must be paid for.

- 3.12.2** For work (including travel time) as a result of being called out the employee will receive an overtime payment at time and a half, with the exception of work on general public holidays which will be at double time. Time off in lieu should be at plain time.

By agreement between employers and staff, there may be local arrangements whereby the payment for hours worked during a given period of on-call is subject to a fixed minimum level, in place of separately recognising travel time.

- 3.12.3** In addition, where employers and staff agree it is appropriate, the amount paid for work and travel time during periods of on-call may be decided on a prospective basis (e.g. for a forward period of three months), based on the average work carried out during a prior reference period (e.g. of three months). Where these arrangements are agreed the actual work carried out during a given period should be monitored and, if the average amount assumed in the calculation of the payment is significantly different, the level of payment should be adjusted for the next period; there should be no retrospective adjustment to the amount paid in the previous period.

3.13 Other Arrangements to provide Extended Service Cover

Some staff are required to be on the premises to provide emergency cover but are allowed to rest except for the times when they are required to carry out emergency work. Where employers consider this an essential arrangement to provide service cover there should be an agreed local arrangement (subject to Working Time Legislation), at least equivalent to on-call payments, to recognise the type of cover provided.

TO BE COMPLETED BY MANAGER

AUTHORISATION OF CAR USERS

Please complete and return to the Human Resources Department. The under mentioned will require to be a **STANDARD/REGULAR*** car user.

***Delete as applicable**

SURNAME.....MR/MRS/MISS/DR
FORENAMES.....
ADDRESS.....
.....
.....
JOB TITLE.....
BASE.....
DATE OF COMMENCEMENT OF DUTIES.....

PRIVATELY OWNED VEHICLES

TYPE OF CAR USER.....(Either Regular/Standard)
ESTIMATED ANNUAL MILEAGE.....(Only complete if Regular)
MAKE & TYPE OF VEHICLE.....
REGISTRATION NO..... C.C.RATING.....

“I certify that the Insurance Policy in respect of my Motor Car Registration No. as above, provides cover, while the car is being used upon official business, for Full Third Party Insurance Cover, against Risk of Injury, or Death of, Passengers, and Damage to Property, and that the Policy is now in force and covers the journeys claimed.

I further certify that my vehicle is currently being maintained in a roadworthy condition”.

SIGNED BY EMPLOYEE..... DATE.....
SIGNED BY MANAGER..... DATE.....
POSITION.....

PLEASE ATTACH A PHOTOCOPY OF YOUR DRIVING LICENCE, WITHOUT THIS THE FORM CANNOT BE PROCESSED

AGREEMENT FOR PURCHASE OF BICYCLE AND EQUIPMENT

Name

I agree to repay the payment made towards the purchase of the bicycle and related equipment if I leave the PCT within one year of purchase, and for that amount to be deducted from my final salary payment.

I am aware that I am responsible for the maintenance, safety and insurance of my bicycle.

I am also aware that replacing the bicycle if it is stolen or lost is my responsibility.

I am aware that I am not eligible to claim regular car user allowances.

Signature Date

(Employee)

Signature Date

(Manager)

Once completed please return pages 1 and 2 to the Human Resources Department.

BICYCLE CLAIM FORM

Name

Home Address

.....

.....

Designation

Base Ext

Bicycle Purchase Date:	Description:	Cost (up to maximum £150)	Agreed Payment:
Equipment Purchase Date:	Description:	Cost (up to a maximum £75)	Agreed Payment:
TOTAL:			Agreed Payment:

Employee Signature Date

I confirm that this is in line with the current bicycle policy:

Manager (name)

Manager Signature Date

Department Budget Code:

Department Account Code:

Authorised for payment by (Budget Holder)

Signature Date

Please send both pages of this completed form to Human Resources

TO BE COMPLETED BY MANAGER

AUTHORISATION OF CYCLE USERS

Please complete and return to the Human Resources Department. The under mentioned is entitled to claim cycle allowance.

SURNAME.....MR/MRS/MISS/DR

FORENAMES.....

ADDRESS.....

.....

.....

JOB TITLE.....

BASE.....

DATE OF COMMENCEMENT OF DUTIES.....

ALLOWANCE TO BE CLAIMED

*I wish to claim the £150 allowance per year (regular cyclist allowance)

Or

*I wish to claim the cycle mileage allowance at a rate of 13.2p per mile

*Please delete as appropriate

By signing this document I am confirming that my bicycle is insured for public liability.

SIGNED BY EMPLOYEE.....DATE.....

SIGNED BY MANAGER.....DATE.....

POSITION.....

SEASON TICKET LOAN AGREEMENT

Parties to this agreement are:

- Hounslow Primary Care Trust (the lender).
- As per name on the application (the borrower).

The lender agrees to make available to the borrower, within 10 days of receipt of the application form the sum specified in the attached application form. The borrower shall repay the loan:

- in 12 consecutive monthly payments beginning in the first complete month after receipt of the loan.

The borrower agrees to have these repayments deducted from his/her salary at source.

The borrower may at any time within the period of the loan apply to terminate the agreement by repayment of the full balance of the loan outstanding.

While the borrower is an employee of the lender the interest charged for the loan shall be set at zero.

Where both parties agree, the period of the loan may be reduced by means of an increase in the amount of the weekly/monthly instalments. Where in circumstances of financial hardship the borrower requests an extension to the loan period, this may be granted at the discretion of the lender within a maximum of 5 years.

The borrower agrees that the lender shall deduct from the salary of the borrower the amounts of the instalments stated above, beginning in the month following the execution of the loan.

The borrower further agrees that:

- In the event of his/her contract of service with the lender terminating before completion of the repayment of the loan, he/she will repay immediately upon request the balance outstanding on the loan. The borrower agrees to the deduction of the outstanding balance from his/her last salary payments.*
- If despite (a) above any part of the loan remains outstanding when he/she ceases to be an employee of the borrower, he/she shall pay interest on the loan at a rate of 15% per annum.*
- He/she shall not dispose of the season ticket in respect of which the loan has been granted without the prior consent of the lender, if the lender authorises disposal, the borrower will repay the lender the balance of the sum still owing immediately upon disposal.*
- He/she will forward at the request of the treasurer of the lender proof of the existence of the season ticket.*
- Should the borrower fail to fulfil any of his/her obligations under this agreement then it will be at the discretion of the lender whether or not to terminate the Agreement and request immediate repayment of any outstanding sums.*

APPLICATION FOR ANNUAL SEASON TICKET LOAN

FORM TO BE COMPLETED IN BLOCK CAPITALS

Name

Home Address

.....

.....

Home Tel No

Base Ext No

Staff Number

Details of Ticket required

Date required

Travelling from

To

Cost of Annual Season Ticket

Advance requested

Payee (e.g. South West Trains, Transport for London)

Statement

I wish to apply for an advance as shown above, and agree to repayment by pay deduction. In the event of my leaving the employment of Hounslow Primary Care Trust I agree that the balance outstanding shall be deducted from my final salary and if there are insufficient monies in my last salary payment to cover the total amount due, I will reimburse the outstanding difference before I leave the employment of the above named organisation.

Signed (Employee) Date

Signed (Manager) Date

Notes

1. The terms of agreement on page 1
2. The interest free loan will be deducted via your salary over 12 months as appropriate, commencing from the first complete month after receipt of the loan
Once completed the form should be returned to: Human Resources Department, Phoenix Court, 531 Staines Road, Hounslow, Middlesex, TW4 5DP **at least 10 working days before the cheque is required.**