|  |
| --- |
| Immigration Fees Reimbursement Request Form |
| **Guidance** |
| This form should be completed by eligible employees who are applying for reimbursement of the costs they incurred when securing or extending their, and/or their dependant’s, visa.Please note only standard visa fees are eligible for reimbursement. Additional fees for the enhanced UKVI service options will be the responsibility of the applicant.Please complete all parts of Section One then submit this to your local School/Department Administrator or Line Manager. Please attach the form and all of the relevant scanned receipts.For help in completing the form, please refer to the [Immigration Fees Reimbursement Request Form Guidance notes.](https://www.ed.ac.uk/human-resources/a-to-z-of-forms) If you require this document in an alternative format please contact HR via email HRHelpline@ed.ac.uk **Privacy Statement -** For information on how we use your data, how long we keep it for and if we share it with third parties, please refer to the [Privacy Notice for Staff](https://edin.ac/2KLLOGK) and [Finance Privacy Notice](https://www.ed.ac.uk/finance/about/privacy). |
| ***Before completing the form, please confirm one of the following:******I applied for my visa/Residency to:*** Choose an item. |
| **Section 1 – to be completed by Applicant:** 1. **Applicant’s Details**
 |
| Title, First Name(s) & Surname: | Click or tap here to enter text. |
| Employee Number:  | Click or tap here to enter text. |
| Telephone Number:  | Click or tap here to enter text. |
| Email Address:  | Click or tap here to enter text. |
| 1. **Work Information**
 |
| Job Title:  | Click or tap here to enter text. |
| Department/ School:  | Click or tap here to enter text. |
| Type of Contract | Choose an item. |
| Employment Start Date (dd/mm/yyyy):  | Click or tap to enter a date. |
| Employment End Date (Fixed Term contracts only) (dd/mm/yyyy): | Click or tap to enter a date. |
| 1. **Visa Details**
 |
| Visa Type: Choose an item. |
| Visa Length (not applicable to Indefinite Leave to Remain (ILR) requests): Click or tap here to enter text.  |
| Fees Cover: Choose an item. |
| **\* Full Name of dependant** **(use an additional sheet if necessary)** | **Relationship (i.e. spouse/partner or child under 18)** |
| Click or tap here to enter text.  | Click or tap here to enter text. |
| Click or tap here to enter text. | Click or tap here to enter text. |
| Click or tap here to enter text. | Click or tap here to enter text. |
| Click or tap here to enter text. | Click or tap here to enter text. |
| **Date fees paid** (dd/mm/yyyy)**:** Click or tap to enter a date. | **Visa expiry date** (dd/mm/yyyy)**:** Click or tap to enter a date. |
| 1. **EXPENSE DETAILS -** Only the standard visa fees and UK ENIC fees are eligible for reimbursement, enhanced UKVI service fees or UK ENIC Fast Track service fees **will not** be reimbursed. Please note BRP fees are included in the cost of obtaining a visa. If you have paid in a foreign currency, please enter the amount in pound sterling as stated on [UKVI website](https://www.gov.uk/government/publications/visa-regulations-revised-table)
 |
| **Expense** | **Applicant** | **Dependant(s) Total** | **Total** |
| **Visa fee** |       |       | £0.00 |
| **UK ENIC fee (Skilled Worker only)** |       | £ n/a | £0.00 |
| **Test fee, eg English Language or Life in the UK** |       | £ n/a | £0.00 |
| **NHS fee**  |       |       | £0.00 |
| **Grand totals** | £0.00 | £0.00 | **£0.00** |
| 1. **UK TAX ASSESSMENT**
 |
| Please note, ILR requests for reimbursement are likely to be subject to tax and national insurance.For other routes, in order for the expenses to be reimbursed free of tax and national insurance contributions, you must:1. incur the expense within 5 years of the date that you first arrived in the UK to work, and
2. not have been:
	* present in the UK for any purpose in the 2 year period prior to this arrival date; or
	* resident in the UK for tax purposes (e.g. been in paid employment) in either of the two UK tax years prior to your arrival date. (Note: the UK tax year runs from 6 April to 5 April. Appendix 1 of the Guidance Notes will help you determine these dates.)

In order for your dependants’ fees to be reimbursed free of tax and national insurance contributions, you must be employed for a continuous period of 60 days. |
| *Note: if you do not provide the following dates, the University will deduct UK tax and national insurance contributions from the total sum claimed and you will need to contact the UK tax authority, HMRC to recover any tax you should not have paid.* |
| 1. **Date you first arrived in the UK to work (dd/mm/yyyy):** Click or tap to enter a date.
 |
| 1. **Were you present in the UK for any purpose\* in the 2 year period prior to the date you first came to the UK to work (i.e. the date in 1)? \* e.g. vacation, conference, interview, work**
 | Choose an item. |
| 1. **Were you resident in the UK for tax purposes (e.g. worked in the UK) in either of the 2 UK tax years prior to the date you first came to the UK to work? (i.e. the date in 1 above)**
 | Choose an item. |
| If ‘No’ to 3 above, please proceed to complete sections F and G. If ‘Yes’ to 3 above, please provide the following information: (please refer to Guidance Notes for the dates of each tax year). Use an additional sheet if necessary. Please then complete Sections F and G.  |
| **Relevant tax year** | **Dates resident in UK in the relevant tax year (dd/mm/yyyy)** |
| **From 6 April:**      | **To 5 April:**      | **From:**       | **To:**       |
| **From 6 April:** | **To 5 April:**      | **From:**       | **To:**       |
| **From 6 April:**      | **To 5 April:**      | **From:**       | **To:**       |
| 1. **LOAN FACILITY**
 |
| **Has the University provided you with a loan to help you pay your fees?** | Choose an item. |
| **If yes give loan details.** | Click or tap here to enter text. |
| 1. **DECLARATION**
 |
| 1. I confirm that all information provided is true and accurate and understand that the University has the right to request additional information to confirm the make-up of the fees paid and claimed back.
2. I understand that, due to UK tax rules, I may receive less back from the University than I have paid to UKVI.
3. I understand that the University may need to disclose this information to the UK tax authorities.
4. I confirm I have not resigned and am not working out my notice period.
5. I understand that if I leave my employment voluntarily within 3 years of the date the visa was granted, I will be required to repay the University as per the [Immigration Fee Financial Assistance Guidelines.](https://www.ed.ac.uk/sites/default/files/atoms/files/immigration_fee_assistance_guidelines_v01-11-23_final.docx)
 |
| **Signature:** Click or tap here to enter text. | **Date (dd/mm/yyyy):** Click or tap to enter a date. |
| **NEXT STEP**:Submit the form by email to your local School/Department Administrator or Line Manager. You must attach this form and scanned receipts/ evidence of payment to UKVI, SELT and UK ENIC (e.g. bank/credit card statement)**.** Claims will not be processed without evidence of payment to UKVI/UK ENIC.  |
| **PRIVACY STATEMENT** |
| This ‘privacy statement’ explains what the University will do with the information you, and your dependants have provided in this application. It explains why we hold this information, the legal basis we can rely on to collect and retain the information, how long we keep if for and who we share it with. **Your personal information:** as the information you have provided will form part of your general employment record with the University, please refer to the [Privacy Notice for Staff](https://edin.ac/2KLLOGK). **Your dependant’s information:** the information your dependant has provided will support the administration of your reimbursement request.Our legal basis for processing this information is ‘performance of contract’ and your explicit consent regarding your dependant status. We will retain your application form for 6 years, after which time it will be destroyed.This Privacy statement is continued at: [edin.ac/privacy](https://www.ed.ac.uk/records-management/notice) |

|  |
| --- |
| **Section 2: College/Professional Services Group Department Authorisation (to be completed by Director of Professional Services/ Support Group Head of Department or equivalent)**  |
| **A. FEE TOTALS AND COSTING DETAILS**  |

|  |
| --- |
| **Please complete the costing details below. For further guidance please refer to the guidance on the chart of accounts available on the** [**Finance Sharepoint**](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx)**. Costs should be charged to your area cost centre.** |
|  | **% Split** | **Entity****(3 digits)** | **Fund****(6 digits)** | **Cost Centre** **(8 digits)** | **Analysis****(6 digits)** | **Portfolio****(8 digits** | **Product****(8 digits)** | **Intercompany****(3 digits)** |
| **Guidance** |  | **Driven by payroll element** **Use the mapping tool** | **MANDATORY****Required to capture the type of funding the payroll cost is attached to​** | **MANDATORY****Organisational Unit (department)** | **Likely to always be zero but cross check against the mapping tool** | **Likely to always be zero but cross check against the mapping tool** | **Likely to always be zero but cross check against the mapping tool** | **For cross charging to or from a subsidiary, cross check against the mapping tool** |
| **EXAMPLE** | 100% | 110 | 123456 | 12345678 | 000000 | 00000000 | 00000000 | 000 |
| **NHS Costs** | **£** |     % |     |       |       |       |       |       |       |
| **NHS Costs** | **£** |     % |     |       |       |       |       |       |       |
| **NHS Costs** | **£** |     % |     |       |       |       |       |       |       |
| **Visa & UK ENIC Cost** | **£** |     % |     |       |       |       |       |       |       |
| **Visa & UK ENIC Cost** | **£** |     % |     |       |       |       |       |       |       |
| **Visa & UK ENIC Cost** | **£** |     % |     |       |       |       |       |       |       |

|  |
| --- |
| **B. Authorisation: I confirm that the visa expenses claimed are in line with the University’s Immigration Fee Assistance Guidelines and authorise their repayment, coded as above.** |
| **Name:** Click or tap here to enter text. | **Job Title:** Click or tap here to enter text. | **Date:** Click or tap to enter a date. |
| **Next Step**: Please submit the authorised form and the accompanying receipts/evidence of payment by raising a Service Request>Forms>Visa Fee Reimbursement. The form will then be checked and authorised by HR Operations. |

|  |
| --- |
| **Section 3: HR Authorisation (to be completed by HR Operations)** |
| On receipt of the form, HR Operations should check the completeness and accuracy of the form before authorising and sending to Payroll. |
| **Name:**  | Click or tap here to enter text. |
| **Date (dd/mm/yyyy):**  | Click or tap to enter a date. |
| **Next Step**Forward the completed form and relevant attachments by Service Request to Payroll. Indicate if ‘Urgent’ and ‘Payroll Impacting Month’.  |

|  |
| --- |
| **Section 4: FOR USE BY PAYROLL ONLY** |
| I. Date fees paid (dd/mm/yyyy): (take date from Section One C) | Click or tap to enter a date. |
| II. Date employee arrived in the UK to work (dd/mm/yyyy): (take date from Section One E, 1) | Click or tap to enter a date. |
| III. Did employee incur the expenses within 5 years of arriving in the UK to work? (i.e. time that has elapsed between I and II above)  | Choose an item. |
| If ‘No’ to III above: i.e. expenses were incurred outside of the 5 year permitted period - payment is subject to tax and NICs (no further test is required)  |
| If ‘Yes’ to III above, i.e. payment is within 5 year permitted period, further tests are required to determine if the payment is subject to or exempt from UK tax and NICs.  |
| IV. Relevant tax year: 6 April      to 5 April      |

|  |  |
| --- | --- |
| Test | Response |
| 1. Was employee present in UK in the 2 years before their ‘arrival date’? (see Section One E, 2)
 | Choose an item. |
| 1. Was employee resident for tax purposes in either of the relevant tax years

(see dates in Section One E, 3Four C and relevant tax years in Section IV above)  | Choose an item. |
| Based on combination of the above, payment is: (refer to ready reckoner table below)  | Non-taxable / taxable |
|  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test | Response | Response | Response | Response |
| 1. Was employee present in UK in the 2 years before their ‘arrival date’?
 | No | Yes | No | Yes |
| 1. Was employee resident in either of the 2 relevant tax years?
 | No | No | Yes | Yes |
| Based on combination of a) and b) status of payment is: | Non –taxable | Taxable |
| Note: if employee’s employment will last for less than 60 days from the date they paid their fees, any fees paid in behalf of their dependants will be subject to tax and NICs  |
| Note: please check if claimant is in receipt of interest-free visa loan |
| Payroll notes:       |