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| **Working Abroad Assessment Checklist** |
| Guidance:Please ensure you have read the Working Abroad information on the HR [webpages](https://www.ed.ac.uk/human-resources/working-abroad/approval-process). **Before** the manager completes and submits this checklist, they must first seek [agreement](https://www.ed.ac.uk/human-resources/working-abroad/approval-process) in principle from the **Head of School/Deanery (College) or Head of Department, Professional Services Group (PSG)**. The agreement is subject to the criteria which permits the working abroad assignment and also that the school/department budget is available to cover the cost of obtaining external legal, tax advice and any other associated working abroad costs. Following this agreement, the working abroad team will liaise with the Manager and School/Department administrator to complete the assessment.After the working abroad assessment is complete, the manager must review and consider the advice, risks and associated costs and share with the Head of School/Deanery (College) or Head of Department (PSG). The manager should seek [final approval](https://www.ed.ac.uk/human-resources/working-abroad/approval-process) from the **Head of College/PSG** to proceed. This process must be complete **prior to** the individual travelling abroad.Due to the assessment complexities, this can be **15 weeks average** to complete including establishing if:* the individual can secure the right to work for a UK employer in a particular country or jurisdiction
* local labour laws will apply to their employment while working in that country and how these vary from standard University of Edinburgh conditions of service and UK employment rights
* a contract of employment in the language of the country concerned is required
* their working for the University in a particular country would create a Permanent Establishment (PE) in that country or the need to register or set up in country payroll processing to enable tax and social security withholding etc
* pension contributions can or continue to be paid whilst the individual is working abroad
* there are any insurance implications

Consequences of non-compliance include individuals not being able to access in-country healthcare, removed from the overseas country, financial fines on the University and potential reputational damage. In addition to the information below, the manager may be asked to provide further information, depending upon the details of the case and external professional advice. If there is a requirement to seek legal, tax, social security and pensions advice externally, the [cost](https://www.ed.ac.uk/human-resources/working-abroad/assessment-process/costs) will be borne by the local School/Department. The Working Abroad team will liaise with the manager or local school/department administrator to source cost estimates. ***The Checklist and assessment will be completed in the following order:***1. ***Head of School/Deanery/Department agreement = Approvals Process Section (below)***
2. ***Manager = Checklist Sections 1-5, submit to Working Abroad Team with agreement email***
3. **Working Abroad Team = Assessment Sections 6 and 7**
4. **Head of College Final Approval = Section 6 (relevant part)**
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| **This Section should be completed by the Head of School/Deanery (College)/Department (PSG):** |
| [**Approval Process**](https://www.ed.ac.uk/human-resources/working-abroad/approval-process): [ ] I, *Head of School/Deanery (Colleges)/Head of Department (PSG) confirm agreement in principle that the working abroad* [*criteria*](https://www.ed.ac.uk/human-resources/working-abroad/approval-process) *is met and to proceed with a working abroad assessment*[ ] *I confirm that I understand 100% of the working abroad management costs (external advice, possible recurring foreign payroll processing costs etc.) will be charged to the College/Department.* [ ] *I confirm I am aware of the risks incurred if the individual starts working for the University from outside the UK without the appropriate regulatory requirements being met (tax, social security, immigration, employment law etc.) and any potential sanctions (financial fines for both the individual and the University, business disruption, reputational damage).*Name & Job Title**:** Click or tap here to enter text. Agreement Date: Date from**The above 3 boxes must be checked by the Head of School/Deanery/Department and submitted to working abroad together with the agreement email**. |
| **The following Sections 1 - 5 should be completed by the prospective/employee’s Manager:** |
| [ ]  I confirm by checking this box that I have received agreement in principle (email) from the Head of School/Deanery/Department and this is attached with to the completed checklist. |
| **Section 1: Individual/Prospective Individual details** |
| Is the individual a current or prospective employee? | Choose an item. |
| Which **country** is the person **currently** based and since what date? | Choose an item.Currently based in which country: Click or tap here to enter text.Click or tap to enter a date. |
| Name: | Click or tap here to enter text. |
| Employee Number (if current employee): | Click or tap here to enter text. |
| School/Department: | Click or tap here to enter text. |
| College/Professional Services Group: | Click or tap here to enter text. |
| **Section 2 Employment details** |
| Contract Type:  | Choose an item. |
| Fixed-term contract end date (if applicable): | Click or tap to enter a date. |
| Weekly contractual hours: | Choose an item. |
| Job Title: | Click or tap here to enter text. |
| Grade/Salary: | Click or tap here to enter text. |
| Proposed employment start date with the University (if prospective employee): | Click or tap to enter a date. |
| How does the working abroad request meet the specific criteria as set by the University’s [Approval process](https://www.ed.ac.uk/human-resources/working-abroad/approval-process): If the listed criteria is not met, provide a brief explanation for the request. | Choose an item.If not met Click or tap here to enter text. |
| Does the University require the individual to work outside of the UK or is this a personal request? | [ ]  **YES:** as per the above criteria, the University does require the individual to work in this country.[ ]  **NO**: Personal Request: please provide further details: |
| What is the nature of the work? (brief description e.g. research, include if the work is linked to that country): | Click or tap here to enter text. |
| Will the individual continue to be paid entirely by the University into their UK bank account, in GBP?  | Choose an item. If No provide further information:Click or tap here to enter text. |
| Will there be any contractual changes, e.g change in working hours, due to working abroad? | Choose an item. If Yes provide further information:Click or tap here to enter text. |
| Is the individual currently a member of a pension scheme with the University? | Choose an item. |
| Does the individual hold any form of NHS Honorary cover? e.g. Honorary contract, research passport, letter of access? | Choose an item.If yes, provide details:If Yes, has approval to work abroad been obtained from the relevant NHS Board’s HR team?Choose an item.If Yes, provide Name & Date of Approval: |
| **Section 3: Overseas Collaboration** |
| Will the individual be engaging with an overseas university or other organisation?  | Choose an item. If Yes, provide details:Click or tap here to enter text. |
| Will the individual be using the premises, tools or equipment of the overseas university or other organisations? | Choose an item. If Yes, provide details:Click or tap here to enter text. |
| If the individual is to be involved with an overseas university or organisation, is there written agreement in place between the employee/University and the host university or organisation? If Yes, **please attach a copy**.  | Choose an item. If Yes, provide details:Click or tap here to enter text. |
| **Section 4: Working in UK/Abroad** |
| Nationality/Citizenship: *If dual national include details* | Please enter nationality/citizenshipPlease enter second nationality/citizenship if dual national |
| List the **proposed** country/countries abroad and dates of employment abroad, please also include time spent in UK if a combination: |  |
| Enter Country. | Date from | Date to |  |
| Enter Country. | Date from | Date to |  |
| Enter Country. | Date from | Date to |  |
| Enter Country. | Date from | Date from |  |
| If specific dates are not available, please provide an approximate % of the year in each country. | UK Enter % | Country Enter %  |  |
| Is there a possibility the time working abroad could be extended? If yes, provide details. | Choose an item. If Yes:Click or tap here to enter text. |
| Full address where employee will be working in overseas country: | Enter address |
| Is the above address a residential address? | Choose an item. |
| Will the individual relocate to work for the University in Edinburgh/UK after work abroad is completed? | Choose an item.If yes, but date not provided or different to above, please confirm date of return/relocation.Date to |
| Has the individual worked lived and worked outside the UK in the last 3 years (including currently?) If **yes**, please list **every** country and dates as follows: | Choose an item. |
| Enter Country. | Date from | Date to |
| Enter Country. | Date from | Date to |
| Enter Country. | Date from | Date to |
| Will any of the individual’s employment costs be recharged to a third party? If yes, please provide details of the third party | Choose an item.Click or tap here to enter text. |
| Will any additional allowances, subsistence, flights, accommodation benefits etc be paid to or on behalf of the individual whilst working overseas? If yes, provide details | Choose an item.If yes, provide details:Click or tap here to enter text. |
| Has the individual filed tax returns in their home (or other overseas) country or countries in the last three years? If yes, please provide details | Choose an item.If yes, provide details:Click or tap here to enter text. |
| Where will the individual receive their UoE salary whilst working abroad? (e.g. a UK or overseas bank account?) | Choose an item. |
| **Section 5: Right to work** |
| Individual’s Right to work in UK | Choose an item. |
| Right to work in proposed overseas country e.g visa/work permit. List country/right to work. If evidence provided, **the manager should verify documents and submit proof.** Further information[**here**](https://www.ed.ac.uk/human-resources/working-abroad/assessment-process/right-to-work) | Country Name: Click or tap here to enter text.Visa/Right to Work:Evidence attached: Choose an item. |
| School/Department **General Ledger** **Coding**: (recharging costs for employment law, tax, pensions advice)*The coding can be requested from the local school/department administrator.*

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| **Entity** | **Fund** | **Cost Centre** | **Account** | **Analysis** | **Portfolio** | **Product** | **Intercompany** |
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Please update the above, the assessment cannot be processed by working abroad unless included.  |
| *I accept there may be nominal* [*costs*](https://www.ed.ac.uk/human-resources/working-abroad/assessment-process/costs) *(approximately £70 + VAT charged via People and Money to the local School/Department to secure an external fee quote for initial legal advice.* |
| Manager Name & Job Title: | Click or tap here to enter text. |
| Manager Email:  | Click or tap here to enter text. |
| Submission Date to Working Abroad: | Date from |
| **Please ensure all the above sections are completed before submitting**  |
| **Section 6: This section is for Working Abroad/Finance/Head of College Response** |
| Employment Right to work position in Overseas Country | Choose an item. |
| Employment Law Advice received (if applicable) | Click or tap here to enter text. Date Received: Date from |
| Does this affect employment position in UK? | Choose an item. |
| Is the individual sponsored (or will they be sponsored) to work in the UK? | Choose an item.If yes, please note sponsorship requirements such as change in employment and/or location etc will need to be considered. |
| Tax Assessment: | Click or tap here to enter text. Assessment Date: Click or tap to enter a date. |
| Social Security Assessment: | Click or tap here to enter text. Assessment Date: Click or tap to enter a date. |
| Pension Assessment: | Click or tap here to enter text. Assessment Date: Click or tap to enter a date. |
| Insurance Assessment: | Click or tap here to enter text. Assessment Date: Click or tap to enter a date. |
| Additional Information (if required): | Click or tap here to enter text. |
| Total estimated cost of working abroad: | £Click or tap here to enter text. |
| *In accordance with the University’s* [*Approvals*](https://www.ed.ac.uk/human-resources/working-abroad/approval-process) *process, I have reviewed this case including the working abroad advice and any associated risks and costs and confirm approval to proceed:*  |
| Head of College Review & Approval: | Name: Click or tap here to enter text.Date: Click or tap to enter a date. |
| **Section 7: This Section is for HR and the School/Department Administrator** |
| For local School/Department Administrator: | [ ]  If this individual has a Skilled Worker visa, you must send a [Service Request](https://www.ed.ac.uk/human-resources/hr-helpline) by logging into People and Money. The service request should include dates confirming when the individual will be outside the UK. This allows HR Operations to report to the UKVI. |
| For HR:  | [ ]  HR Operations generate standard University of Edinburgh contract of employment |
| [ ]  HR Operations generate standard University of Edinburgh change in terms and conditions letter for review by Working abroad team |
| [ ]  Confirmation draft letter for overseas assignment will be emailed by Working Abroad team to the School Department Administrator/Manager to issue  |

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