

Policies, Procedures, Guidelines and Protocols

Document Details		
Title		Policy for the recovery of Overpayments and Payment of Underpayments
Trust Ref No		2055
Local Ref (optional)		
Main points the document covers		This policy outlines the process for the recovery of overpayments and the payments of underpayments.
Who is the document aimed at?		This policy is aimed at all staff.
Owner		People Services
Approval process		
Who has been consulted in the development of this policy?		People Directorate, Pay Services, Finance, JNP
Approved by (Committee/Director)		People Committee
Approval Date		January 2025
Initial Equality Impact Screening		Yes
Full Equality Impact Assessment		N/A
Lead Director		Director of People and Organisational Development
Category		Workforce
Sub Category		People Services
Review date		November 2027
Distribution		
Who the policy will be distributed to		All employees
Method		Dissemination via Infreemation to all employees
Keywords		Underpayment, Overpayment, Payment
Document Links		
Required by CQC		No
Other		None
Amendments History		
No	Date	Amendment
1	November 2013	Replaces previous Policy which transferred from the PCT
2	December 2016	Amendments to reflect current practice.
3	July 2022	Changed job title of Lead Director. Review in 81. Deleted.
4	November 2024	More detail included following new National Framework.

Contents

1. Introduction.....	3
2. Policy Statement.....	3
3. Scope.....	3
4. General principles.....	4
5. Roles and Responsibilities.....	4
6. Avoiding overpayments and underpayments.....	5
7. If an error is noticed by an employee	6
8. If an employee has been underpaid.....	6
9. If there is a disagreement about an underpayment.....	7
10. If an employee has left their role.....	7
11. Costs incurred due to an underpayment.....	8
12. Notifying employees of an overpayment.....	8
13. If employees disagree about an overpayment.....	9
14. Recovery of overpayment.....	9
15. Bank or Locum Workers.....	10
16. Concerns about financial hardship.....	10
17. Leaving the organisation during a repayment plan.....	11
18. What happens if employees don't respond.....	11
19. Counter fraud.....	11
20. Resolving concerns.....	12
21. Resolving third part payment errors.....	12
22. Incorrect payments of Tax and National Insurance.....	13
23. Auditing and Monitoring.....	13
24. Training.....	13
25. Monitoring and Review.....	13
26. EQIA	13
27. References.....	13

Appendices

- Appendix 1. Process for the Recovery of Overpayments from an Employee in Post
- Appendix 2. Process for the Recovery of Overpayments from an Employee who has left the Trust
- Appendix 3. Standard Letter – Notification of Overpayment
- Appendix 4. Standard Repayment Plan Letter
- Appendix 5. Examples of Overpayments and Underpayments
- Appendix 6. Additional Guidance for managers
- Appendix 7. Links to more help and guidance

1. Introduction

- 1.1 Shropcom (The Trust) has a responsibility to ensure that all staff are paid correctly for work undertaken.
- 1.2 The Trust acknowledges that errors can occur resulting in employees being under or overpaid salary, allowances or benefits.
- 1.3 It is Trust policy to recover all overpayments and managers must ensure that the individual's terms and conditions are considered before any steps are taken to recover an overpayments as contractual terms may vary.
- 1.4 The process for the recovery of an overpayment to an employee and ex-employee is set out in Appendix 1 and 2.

2. Policy Statement

- 2.1 This policy sets out the steps that will be taken to recover overpayments to employees and the payment of underpayments to employees by the Trust. This policy also aims to define where responsibilities for repayment lie and aims to ensure that a transparent, fair and consistent approach is followed when an incorrect salary payment is made.

3. Scope

- 3.1 This policy will apply to all employees and ex-employees of the Trust whether full time or part time, permanent or temporary including those employed by the Trust via the Temporary Staffing Department.
- 3.2 This policy does not apply to individuals employed by agencies or other contractors.
- 3.3 In implementing this policy, managers must ensure that all employees are treated fairly, equitably and within the provisions and the spirit of the Trust's Equality and Diversity Policy.
- 3.4 Managers must ensure that the individual's terms and conditions are considered before any steps are taken to recover any overpayments as contractual terms may vary.

4. General Principles

- 4.1 The Trust acknowledges that errors can occur resulting in employees being under or overpaid salary, allowances or benefits. Examples reasons of underpayments and overpayments can be found in Appendix 5. The Trust also has a responsibility to ensure that all staff are paid correctly for work undertaken.
- 4.2 The Trust makes every effort to avoid overpayments and underpayments; however, the Trust is duty bound to recover all overpayments.

5. Roles and Responsibilities

5.1 Managerial Responsibilities

- Ensuring that pay-related records for their staff sent by them to Pay Services or entered directly into automated time and attendance systems (e roster) in a timely way, are accurate and reflect the hours actually worked.
- Ensuring that, where available, salary payments are checked monthly on finance reports and reporting/correcting any errors or anomalies as soon as possible.
- Ensuring Pay Services are notified in a timely manner of any change in employee circumstances which impact upon pay and in accordance with Pay Services cut off dates.

5.2 Employee Responsibilities

- Ensuring that they understand their salary entitlement.
- Accurately claiming for authorised hours worked.
- Submitting travel or subsistence claims with receipts or time sheets in a timely manner to meet Pay Services deadlines.
- Checking their payslip via ESR and alerting their manager to any over or underpayment.
- Immediately reporting any pay discrepancy identified on their payslip to their line manager.
- Repaying any identified overpayments within a timeframe agreed between the employee and Pay Services.

- Seeking clarification if they are unsure of the amount or any payments indicated on their payslip.
- Ensuring that the Trust has up to date contact details including address and phone numbers.
- Understanding that the Employment Rights Act 1996 (Section 14) outlines employers' right to recover a salary overpayment without that deduction constituting an unauthorised deduction from wages.

5.3 Pay Services Responsibilities

- The accurate and timely processing of all pay and expense related instructions/claims submitted to them.
- Ensuring that once overpayments are highlighted, they are communicated to Finance and the Trust employee in a timely manner. Wherever possible this will be done in advance of pay day.
- Ensuring the relevant manager is informed of the overpayment and made aware of the repayment plan affecting their employee.
- Ensuring that overpayments are recovered in line with the attached appendices.
- Ensuring that underpayments are rectified as soon as possible.
- Informing staff and managers of Pay Services cut off dates.

5.4 People Services

- Reviewing the quarterly report on salary overpayments and making recommendations where necessary.

6. Avoiding overpayments and underpayments

- 6.1 Each year, Pay Services will agree and publish important pay-related dates for every months Pay Services. This ensures everyone knows when they need to submit forms and timesheets, and when the Pay Services is closed for inputting.
- 6.2 Pay services will ensure every manager understands about the starters/movers/leavers/changes process and has access to the right forms to ensure pay is correct and to avoid errors.

- 6.3 All Pay Services forms will be available to complete with guidance notes.
- 6.4 During induction, all employees will be informed about their responsibility to report errors in their pay, and how they can do this.

7. If an error is noticed by an employee

- 7.1 If an employees pay is not as expected and they think there is an error that has led to an overpayment or underpayment, the employee should first check their pay slip via ESR to see what payments were made.
- 7.2 If an employee needs help accessing their payslip, they should contact the ESR team.
- 7.3 If after checking their payslip they believe a mistake has been made, it is the employees' responsibility to highlight this as soon as possible by speaking to their manager to get advice and check if there is anything they can do to correct the error.
- 7.4 The manager will speak to Pay Services to get more information or to escalate mistakes. Pay Services will provide more information about the employees pay and, if needed, they will take action to correct the mistake.

8. If an employee has been underpaid

- 8.1 If an employee has been underpaid, the outstanding amount owed to them will normally be made in their next pay.
- 8.2 If this causes financial difficulties, the employee should contact Pay Services to discuss this, and they will advise if an emergency payment can be made. If the underpayment is rectified immediately, there will be an adjustment made to estimated tax and NI.
- 8.3 If an employee has received no pay or less than 100% of their basic pay (basic pay excludes enhancements or other additions), the employee will be given priority status and Pay Services will respond as soon as possible to provide a solution to resolve the error.
- 8.4 An interim payment will not be made where the shortfall in pay is caused by the employee submitting timesheets or travel claims to Pay Services after the deadline of the tenth day of the month.

- 8.5 If an employee does not agree with the solution provided, they may ask for their decision to be reviewed by the Financial Accounting Manager.

9. If there is a disagreement about an underpayment

- 9.1 If Pay Services do not believe there is a mistake. They will write to the employee to explain the reasons for this.
- 9.2 Employees should contact Pay Services and/or their manager to explain why they disagree with the reasons provided. This will need to be done as soon as possible after the employee has been informed.
- 9.3 If employees are worried or have questions about the process, they should speak to a The People Team, a trade union representative, a staff network colleagues, occupational health, or the Freedom to Speak Up advocates. Appendix 7 provides further information and guidance.
- 9.4 Actions to rectify the underpayment will be put on hold until a decision has been reached.
- 9.5 Pay Services will review the reason for the underpayment and consider the reasons why the employee disagrees with support from the People Team.
- 9.6 The employees line manager may sometimes be asked to provide information to help resolve it.
- 9.7 The employee will be advised of the final decision without unreasonable delay and, as far as reasonably possible, within 4 weeks of the employees first contact.
- 9.8 If the employee remains unhappy with the outcome, they should seek advice from the People Team about how to resolve their concerns.

10. If an employee has left their role

- 10.1 If an employee believes they have been underpaid, or money is owed to them, and they have already left their employment, they should contact their former manager. The manager will provide information about a solution if this has already been put in place or can be put in place by them.
- 10.2 If the manager cannot resolve the problem, they should ask the employee to provide the details in writing, including the reasons they

believe the error was caused, and the estimated amount of money or hours they believe are owed to them.

10.3 The manager will support the former employee to speak to Pay Services for advice if needed.

10.4 Usually, the underpayment will be repaid in the next available pay run.

11. Costs incurred due to an underpayment

11.1 If an employee incurs any costs (such as bank charges) because of an underpayment, these are not normally reclaimable. However, in exceptional circumstances, the Trust may consider this.

11.2 To make a claim, the employee must outline the details in writing to Pay Services, including evidence to show the costs incurred (such as bank letters/statements).

11.3 Pay Services will review this and confirm the actions to be taken.

11.4 If the individual is not happy with the solution provided, they can ask for the decision to be reviewed by the Financial Accounting Manager.

12. Notifying employees of an overpayment

12.1 If it is Pay Services or the manager who identifies the overpayment, they will contact the individual to explain how the error was made. Pay Services will discuss and agree with the individual how they will repay the amount they were overpaid.

12.2 If an overpayment of wages occurs, the employee will be informed of the mistake in writing (appendix 3). The terms of any deduction will aim to minimise financial hardship, but any amounts owed will need to be paid in full in accordance with the procedures outlined in Appendix 1 and 2.

12.3 Receiving this information can be worrying and individuals may want to speak to their manager, or The People Team, about how they are feeling. It might also help to manage finances to minimise the impact of repayments. Appendix 7 Provides information about getting support.

13. If there is disagreement about an overpayment

- 13.1 Employees should contact Pay Services and/or their manager to explain why they disagree that they have been overpaid.
- 13.2 Employees can speak to the People Team, or a trade union representative to get advice or if they have questions about the process. Occupational Health, a staff network colleague, Freedom to Speak up advocates can also provide general advice and guidance.
- 13.3 The recovery of the overpayment will normally be put on hold until a decision has been reached.
- 13.4 The Pay Services Manager/Financial Accountant will review the reason for the overpayment and consider the reasons why the employee disagrees, with support from a The People Team.
- 13.5 The employees line manager may sometimes be asked to provide information about the overpayment to help resolve it.
- 13.6 The employee will be advised of the final decision without unreasonable delay, and as far as reasonably possible, within 4 weeks of the employees first contact.
- 13.7 If the employee remains unhappy with the outcome, they should get advice from the People Team about how to resolve their concerns.

14. Recovery of Overpayments

- 14.1 The Trust has a responsibility to recover all payments from an employee's salary, for overpaid sums. This may include but is not limited to wages, notice pay, holiday pay and any sick pay, in addition to deductions required by law, including all debts owed by the employee to the Trust. This may also include the balance of any outstanding loan, advances on wages, wages overpayments and payments for holiday taken in excess of the employee's entitlement.
- 14.2 Appendix 1 sets out the process to be implemented for the recovery of an overpayment made to an employee in post.
- 14.3 Appendix 2 sets out the process to be implemented for the recovery of an overpayment made to an ex-employee of the Trust.

15. Bank or Locum workers

- 15.1 Due to the nature of bank and locum work, and the fact that work is not guaranteed, if an overpayment occurs it will not normally be possible to set up an overpayment recovery via Pay Services.
- 15.2 Pay Services will calculate the overpayment and they will write to the employee to explain why the error happened. They will ask the employee to make a repayment as soon as possible.

16. Concerns about financial hardship

- 16.1 If the employee believes they will suffer exceptional financial difficulties because of the repayment plan, they make ask for a review of their repayment plan.
- 16.2 Everyone is entitled to receive the National Minimum Wage. So, before making a deduction related to an overpayment, Pay Services will calculate the employees pay, minus any deductions, and will check that the employees average hourly rate of pay for the relevant pay period (after deductions) if not less than the relevant minimum wage rate.
- 16.3 If the employee considers that the timing of the repayment will cause financial hardship or they dispute the overpayment, they will need to contact the Pay Services department by the 5th of the month, to suspend the repayment of overpayment until a repayment plan is agreed by Pay Services/Accounts Receivable and confirmed in writing with the employee (Appendix 4).
- 16.4 Where the employee claims financial hardship and cannot agree a repayment plan, they will be required to complete a Financial Statement with supporting information, i.e. bank statements, council tax bill, utility bills. Documents must be provided to Pay Services within 10 working days when requested. Where an employee fails to provide relevant documentation, automatic recovery of the overpayment will occur in accordance with Appendix 1.
- 16.5 Where the employee submits a notification of financial hardship a meeting may be convened at the employee's request to discuss the repayment plan with the Pay Services Manager and the employee's Manager. An employee may be accompanied at such a meeting by their Trade Union or professional organisation representative or by a work colleague from within the Trust.

17. Leaving the organisation during a repayment plan

- 17.1 If an employee leaves the Trust before they have completed all the agreed repayments, the outstanding money will normally be taken from their final pay.
- 17.2 If their final pay does not cover the total required, Pay Services will contact the employee to agree how the final repayments will be made. Appendix 2 provides further detail.

18. What happens if an employee doesn't respond

- 18.1 If the individual does not respond within 14 days after they have been notified of an overpayment, the Finance department will send a follow-up letter to the employee. This letter will have an attached invoice and repayment instructions.
- 18.2 Pay Services will advise the employees line manager and ask for their help to speak with them. Sometimes, Pay Services may contact the employees new employer/and or their professional body (if applicable) if they do not respond to the letter.
- 18.3 Referrals to a debt collection agency are only done as a last resort, however, if no communication has been received for a further 21 days (35 days in total), the Trust may need to consider referring your debt to a 'Debt Collection Agency'. Occasionally, if all other efforts to resolve a overpayment disagreement has been unsuccessful, it may be agreed that legal action will be taken.

19. Fraud and Misconduct

- 19.1 If an overpayment is considered to have been brought about fraudulently, the matter will be reported to the Trust's Local Counter Fraud Specialist (LCFS) for an investigation to be carried out in accordance with Anti-Fraud Bribery and Corruption Policy. This may lead to disciplinary action in accordance with the Policy and Procedure Disciplinary.
- 19.2 A referral to the LCFS will not stop the process to recover an overpayment, unless this is requested but the Local Counter Fraud Team.
- 19.3 If an overpayment of salary is caused because the employee has wilfully misrepresented facts or relevant data, all possible steps must

be taken to effect immediate recovery. The LCFS will decide whether to carry out an investigation that may culminate in criminal proceedings. Disciplinary action may be taken against an employee in the event of a failure to disclose an overpayment. Full recovery will be sought, and a repayment plan will not be an option in these circumstances.

19.4 If it is found that there is a loss to public funds because of criminal, negligent or fraudulent act or omission, if the employee is a member of the NHS pension scheme, it might be decided that their NHS pension should be reduced to cover the loss.

19.5 Managers requiring guidance should contact the People Advisory team.

20. Resolving concerns

20.1 If an employee is unhappy about any part of this process, they should contact Pay Services or the People Team and provide information about their concerns. They might also wish to contact a trade union representative, or Freedom to Speak Up advocates to get help and advice.

20.2 Pay Services will respond to arrange to discuss concerns in more depth and understand how a solution can be provided and to prevent future concerns.

21. Resolving third party payment errors

21.1 This policy will apply when a deduction due to be paid to a third party has not been made, or is incorrectly made, for example to salary sacrifice payments, such as a lease car.

22. Incorrect payments of Tax and National Insurance

22.1 The HMRC notifies all organisations and employees of incorrect payments of tax and National Insurance contributions automatically via the Government Gateway.

22.2 When the notification is received it is inputted into the Electronic Staff Record (ESR) by automatic data transfer and the adjustment is made from the next pay.

22.3 Employees should contact the HMRC directly to discuss the recovery of tax and National Insurance.

23. Audit and Monitoring

23.1 Records of overpayments and underpayments will be maintained by Pay Services.

23.2 Monthly reviews of under and over-payments made and repayments under repayment plans will be reported by the Head of Pay Services and the Financial Accounting Manager, who will report quarterly to the Director of Finance.

23.3 Overpayments are reported through the Audit and Risk Committee annually and the People and OD Assurance Committee biannually.

24. Training

24.1 Training required to fulfil this policy will be provided by the People Team (HR).

25. Monitoring and Review

25.1 This policy will be periodically review (at least every 3 years) in light of any developments in legislation or relevant national NHS frameworks (including employment legislation or employee relations' practice). If necessary, it will be revised in order to ensure its continuing relevance and effectiveness. Any amendments will be introduced only after consultation with staff-side representatives.

26. Equality Impact Assessment (EQIA)

26.1 This policy applies to all employees equally and does not discriminate positively or negatively between protected characteristics.

27. References

Employment Rights Act 1996

Theft Act 1968

Appendix 1

Process for the Recovery of Overpayments from an Employee in Post

1. Once an overpayment has been identified, Pay Services will liaise with the employee and if necessary, the Financial Accounting Manager to reclaim the full amount in accordance with this policy.
2. If an overpayment is noticed before pay day, the Pay Services team will arrange to recall the payment to prevent the error. They will contact the individual to let them know and they will make the correct payment as soon as possible.
3. If the overpayment happened in the previous month, the employee will normally be asked to repay the full amount the following month. This will be taken out of their pay automatically and Pay Services will re-calculate the deductions for tax, National Insurance and pension if this is needed.
4. Pay Services will explain to the employee how this is done and what it will look like on their payslip and answer any questions they may have.
5. If the overpayment is recognised quickly after payroll, the employee can pay the money back before the next pay day. Pay Services will advise how employees can make this repayment.
6. Where repayment is not recovered from the next payroll, a repayment plan will be required. The process for implementing this payment plan is set out below.

7. Process for Reclaiming Overpayment for an Employee in Post

- 7.1. The overpayment will be confirmed in writing to the employee at their address listed on ESR (Appendix 3), setting out the circumstances of the overpayment and the planned recovery. It is the employee's responsibility to ensure that their address is correct and up to date.
- 7.2. If the letter (Appendix 3) detailing the repayment plan is sent prior to the 15th of the month the repayment will automatically occur in the following month's Pay Services (i.e. if the repayment plan is detailed in a letter dated the 10th January the overpayment will be reclaimed in the February pay run).
- 7.3. If the letter (Appendix 3) is sent between 16th and 31st of the month the repayment will automatically occur in the second month's payroll (i.e. if the repayment plan is detailed in a letter dated the 19th January, the overpayment will be reclaimed in the March pay run).

- 7.4. Where an overpayment has occurred over more than one month, a repayment plan could be agreed during discussions with the manager and Pay Services. The length will not normally exceed the number of months that the overpayment occurred and will not normally exceed 12 months. For example, an overpayment made over a three-month period would be recovered over a three-month period. Employees can be accompanied by a trade union representative/work colleague to these discussions and normally a summary of the agreements will be sent following the meeting.
- 7.5. If during the repayment plan period the employee's salary is affected by maternity leave, half pay due to sickness absence or no pay for any other reason, then the repayment plan may be renegotiated. Employees must contact pay services by the 5th of the month to request a renegotiation.
- 7.6. The Trust may consider changes to any agreed repayment plan if an individual's personal circumstance is substantially affected by incidents outside of their control (e.g. redundancy within the household)
- 7.7. In certain circumstances, where a large overpayment has been made, for example, an overpayment totalling more than one month of the employee's salary, a The People Team and the employees manager will meet with the employee to discuss what has led to the overpayment and what steps should be taken to repay the amount overpaid, and to prevent future overpayments. The employee can be accompanied by a trade union representative at the meeting and a summary of agreements will be sent to the employee following the meeting.
- 7.8. If the employee disagrees about an overpayment, see section 13 of this policy.
- 7.9. If an employee is worried or has questions about the process, they can contact their Manager, the People Team, a trade union representative, occupational health or Freedom to Speak Up advocates. Appendix 7 provides further information and guidance.

Appendix 2

Process for the Recovery of Overpayments from an Employee who has left the Trust

1. In the event of an overpayment being identified, the Pay Services Department will notify the Accounts Receivable at the earliest opportunity and submit an invoice request and letter template identifying the basis of the overpayment to be issued with the invoice.
2. The letter will include a breakdown of the repayment plan and what money is left to repay. It will also provide options for how to repay and information about what they need to do to ensure the repayment is made in full.
3. Where all recovery possibilities have been exhausted, the debt will be referred to a debt collection agency. Where e appropriate Counter Fraud guidance will be sought.
4. In the event of an overpayment being identified by an ex-employee, they must contact Pay Services and their ex-manager immediately.
5. The repayment will be the gross amount to correct the national insurance/tax/pension contributions.
6. Ex-employees may contact Accounts Receivable about the invoice raised for consideration of the repayments to be made by instalments. This will require approval by the Financial Accounting Manager or Head of Financial Accounting (for total repayments under £5000) or the Director of Finance (for repayments over £5000).
7. It is expected that overpayments will be recovered in accordance with the length of time they occurred, in accordance with ACAS practice. For example, an overpayment made over a three-month period would be recovered over a three-month period.
8. Recovery outside of these guidelines will be considered in extenuating circumstances and would be at the discretion of the Financial Accounting Manager or Head of Financial Accounting.

Appendix 3

Standard Letter – Notification of Overpayment Trust Headed Paper – Pay Services Contact details including phone extension

In Strict Confidence

Title and Name

Home address

Date

Dear ...

Notification of Salary Overpayment

I write to confirm as discussed on [insert date] that a salary overpayment relating to incorrect payment of [insert amount] during the period of [insert dates] Has recently been discovered; this has resulted in a gross overpayment of £...

	Should have been paid (£)	Actually paid (£)	To be repaid (£)
Gross pay			
Other payments			
Less deductions			
- Tax			
- National Insurance			
- Superannuation			
- Other deductions			
Net pay			

Either – in accordance with Trust policy we are required to correct this overpayment and therefore we will deduct £.. from your [insert month] salary and £.. per month in [insert date] to [insert date] inclusive.

Or – As agreed with you, we will deduct £.. from your [insert month] salary and £.. per month in [insert date] to [insert date] inclusive.

The repayment will be the gross amount to correct the national insurance/tax/pension contributions.

If you consider that due to exceptional circumstances, the timing of the recovery of overpayment is not possible or if you dispute the overpayment, you must write to Pay Services before the 5th [insert month] to suspend the recovery of the overpayment pending discussions on an alternative repayment plan. If you are unable to repay the overpayment at the proposed rate you must complete a Financial Statement and provide evidence of financial hardship i.e. bank statements, council tax bill, utility bills.

Should you leave the employment of the Trust before the overpayment has been fully recovered, the balance outstanding will be deducted from your final salary, or any arrears subsequently owed to you. In the event that there is a shortfall an invoice will be raised to recover any outstanding amount.

Should you require support, you may wish to visit:

- Shropshire Council has put information together to support Shropshire residents at this challenging and worrying time - <https://www.shropshire.gov.uk/cost-of-living-help/>
- Money helper provide free guidance on money troubles, pensions and retirement, savings etc <https://www.moneyhelper.org.uk/en>
- The STW Wellbeing Hub may be able to sign post to further support <https://www.mpft.nhs.uk/services/psychological-wellbeing-hub>

If you require any further information, please do not hesitate to contact me.

Your sincerely

[insert name]
Pay Services Team

Appendix 4

Standard Repayment Plan Letter Trust Headed Paper – Pay Services Contact details including phone extension

In Strict Confidence
Title and Name
Home address

Date

Dear ...

Further to your request to suspend the recovery of overpayment of £xxxx, I am writing to confirm the final repayment plan agreed in discussion with you.

Month	Salary Deduction	Outstanding overpayment
	£	
	£	
	£	
	£	

Should you require support, you may wish to visit:

- Shropshire Council has put information together to support Shropshire residents at this challenging and worrying time - <https://www.shropshire.gov.uk/cost-of-living-help/>
- Money helper provide free guidance on money troubles, pensions and retirement, savings etc <https://www.moneyhelper.org.uk/en>
- The STW Wellbeing Hub may be able to sign post to further support <https://www.mpft.nhs.uk/services/psychological-wellbeing-hub>

If you have any questions regarding the repayment plan, please do not hesitate to contact me.

Your sincerely

[insert name]
Pay Services Team

Appendix 5

Examples of Overpayments and Underpayments

Overpayments

- Late notification or an error when inputting the start date of sickness, maternity or unpaid leave.
- Late notification or an error when inputting a leaving date.
- Late notification or an error in inputting a change in circumstances e.g reduction from full time to part time hours.

Underpayments

- Late or no notification of returning from maternity leave;
- Late or no notification of returning from long-term sickness absence;
- Late notifications of an extension to an acting up position.
- A system input or other error by the Pay Services team.
- A late change of circumstance notification.
- Using an incorrect salary point.

These examples could cause both underpayments and overpayments.

- Incorrect information provided on job plans to total hours or on-call supplement.
- Pay Services and administrative errors.
- Incorrect, or late, completion of timesheets or expense claims.
- Incorrect annual leave calculations or incomplete recording of annual leave taken.
- Mistakes in relation to scale points/bands at recruitment.

Appendix 6

Additional guidance for managers

Providing support

When a pay error happens, it can have a significant impact on someone's time, thoughts, finances and ultimately their wellbeing. This can sometimes impact their relationships, productivity, and levels of trust or engagement with the Trust.

It's important that when having conversations about pay errors you take the time to listen and take things seriously. An underpayment of what might seem to be a small amount, can impact someone significantly, so always think and act compassionately and do what you can to help progress solutions as soon as possible.

If someone is concerned about an overpayment, they may need some support or help understanding what went wrong, and especially when they are having conversations to agree a repayment plan.

They might also need time to prepare for and attend meetings to discuss a pay error.

Signposting them to advice and support will be helpful, appendix 7 provides a list of useful links.

Appendix 7

Links for more information and guidance

[Getting financial advice – Citizens Advice](#)

Shropshire Council has put information together to support Shropshire residents at this challenging and worrying time -

<https://www.shropshire.gov.uk/cost-of-living-help/>

Money helper provide free guidance on money troubles, pensions and retirement, savings etc <https://www.moneyhelper.org.uk/en>

The STW Wellbeing Hub may be able to sign post to further support

<https://www.mpft.nhs.uk/services/psychological-wellbeing-hub>

Telford & Wrekin Council's Emergency Welfare Crisis Assistance scheme is designed to provide help for residents who have experienced some type of crisis, disaster or unexpected emergency and need assistance or support

<https://telford-gwa.egovhub.net/Gwa/launch>