


Reimbursement of Moving Expenses for New Employees

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|  | Policy identification number: To come... | |
| | File: Business & Finance Policies / Finance and Administration Policies | |
| | <h2>Reimbursement of Moving Expenses for New Employees</h2> <p>Policy Summary</p> <p>To establish criteria for payment of moving expenses to new faculty and administrative employees when moving expenses are offered as part of the employment offer.</p> | |
| Policy Owner | Approval Date | Effective Date |
| Vice President for Finance and Administration | April 25, 2018 | April 25, 2018 |
| Search Terms | Scheduled for Review | |
| r, moving, expenses, vpfa | Spring 2023 | |

Policy Statement

1. Eligibility

Payment and/or reimbursement of relocation and moving expenses is allowable when expenses are included as a formal and specific component of a written offer of employment made to the applicant (the employee) and accepted by the employee in connection with employment at the College. Reimbursement of moving expenses is not meant to be granted routinely, but may be offered to prospective faculty or other employees as an inducement to accept an offer of employment. To be eligible for moving expense reimbursement, the employee's relocation must meet the following conditions.

- Full-time position – the employee must be assigned to a full-time, salaried position and must have agreed to work on a full-time basis for at least one year.
- Distance – the distance between the employee's new work location and the former residence must be at least fifty (50) miles.

2. Payment/Reimbursement Rules and Guidelines

Payment or reimbursement of all other relocation and moving expenses allowable under this policy will have appropriate taxes withheld and will be reported on the employee's annual Form W-2 as income.

A. In general, relocation and moving expenses will be paid on a reimbursement basis; however, sometimes the College may make payment directly to a third party commercial mover with prior approval.

B. Reimbursements are limited to actual costs incurred up to the amounts agreed to by the appropriate Dean or Vice President, and the employee within the limits outlined in this policy. Payments through other processes, such as purchasing cards (P-Cards), or direct payments to hotels, airlines, restaurants, car rental companies, or other vendors on behalf of employee which are processed outside of this policy and associated procedures are not allowed.

Original documents must be submitted as support for expenses. Credit card statements or record of charge slips may be used as supporting documentation but may not serve as the primary document or receipt. A receipt is defined as a written acknowledgment that a specified remittance, article or delivery has been made.

C. Expenditures to be reimbursed must be reasonable and necessary and may consist of the following expenses:

- Commercial moving company
- Packing/crating/mailling/shipping household goods,
- Miscellaneous packing supplies that do not become the personal property of the employee, i.e. padlocks or tools will not be reimbursed
- Optional insurance on items such as furniture, clothing and utensils
- Rental truck
- In-transit storage for up to 30 consecutive days
- Shipment of car(s), if not used in move
- Travel and lodging costs for one trip per person (employee and household members) from the old residence to the new residence, which may include:
 - Mileage for moving per IRS limitations, or reimbursement for gas
 - Lodging in transit
 - Airfare (coach only)
 - Rental car (appropriate measures should be taken to obtain best value)
 - Tolls, taxi, shuttle service, or parking
- Cost of meals at any point in the relocation process, not to exceed the per diem for that location. Alcohol expenses will not be reimbursed.
- House Hunting expenses (trips will not exceed five (5) days) may include:
 - Mileage per IRS guidelines
 - Lodging
 - Airfare (coach only)
 - Rental car (appropriate measures should be taken to obtain best value)
 - Tolls, taxi, shuttle service, or parking
- Temporary quarters

Personal expenses will not be reimbursed.

Reason for Policy

The purpose of this policy is to provide guidelines in accordance with the College policies. Relocation and moving expenses for faculty and staff may be provided if funds are available in the department or school/college/unit budget.

Definitions

Moving/Relocation Expenses: Expenses associated with packing, loading, hauling, insuring or temporarily storing property (no more than 30 days), unpacking, transportation and lodging during the move.

Procedures

The hiring official shall ensure that the employee who is to receive a moving reimbursement is made aware of this policy.

The Human Resources Office shall send a Letter of Offer that will include a maximum reimbursement for moving expenses, if this reimbursement is approved by the appropriate Dean or Vice President.

All expenses submitted for reimbursement must be actual, reasonable, necessary and within policy guidelines. Each employee eligible for moving and relocation reimbursement is responsible for:

- Assisting the department in completing the Check Request form for reimbursement;
- Obtaining and submitting original receipts necessary to support all claims for reimbursement within sixty(60) days after paid or incurred;

Departments and administrative assistants shall assist the employee in completing the check request for reimbursement of moving expenses. The department is responsible for forwarding the Check Request to the appropriate Dean or Vice President for approval.

Original receipts should be attached to a check request, along with a copy of the offer letter outlining the maximum awarded for moving, and returned to the Dean's office (in the case of faculty) or the appropriate Vice Presidents' office for their review and signature. After the appropriate signature, the check request is forwarded to Purchasing for processing. Reimbursement is payable from individual department budgets. All expenses should be coded to account 7523, Employee Relocation Expenses.

Responsibilities

For following policy: All employees

For enforcement of policy: Controller, Director of Purchasing

For oversight of policy: Vice President for Finance & Administration

For notification: Policy Librarian

For procedures implementing policy: Controller, Director of Purchasing

Revision History

April, 2018 - eliminated references to non-qualified and qualified plans based upon changes in federal tax law