### UNIVERSITY OF CALIFORNIA

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**UCM DA 208A** 

SANTA BARBARA • SANTA CRUZ

University of California, Merced 5200 N. Lake Road Merced, CA 95343

October 19, 2022

VICE CHANCELLOR FOR RESEARCH

RE: Delegation of Authority (DA) - Academic Personnel Items

The Academic Personnel Manual (APM) provides policies and procedures pertaining to the employment relationship between an academic appointee and the University of California. In accordance with the Academic Personnel Manual (APM) Section APM 100-d and with the authority delegated to me by the Provost, I hereby authorize you to approve the following academic personnel items:

- The following Office of Research Non-Senate Recruitments:
  - Search Plan; Applicant Pool Report; Shortlist Report; Search Report
- The following Office of Research Appointments:
  - Assistant Professional Research, Steps I-III; Project Scientist; Specialist; Academic Administrator I-III; Postdoctoral Scholar
- Professional Research Merits except Accelerations, Step VI and Above Scale
- The following Merits except Accelerations and Above Scale:
  - Project Scientist; Specialist; Academic Coordinator; Academic Administrator
- The following Office of Research Leaves of Absence:
  - APM710 Sick Leave/ Medical Leave; APM 711 Reasonable Accommodation for Academic Appointees with Disabilities; APM 715 - Family and Medical Leave; APM 730 - Vacation; APM 751 - Military Leave; APM 752 - Leave to Attend Professional Meeting, 7 days or less; APM 760 - Family Accommodations for Childbearing and Childrearing
- Source of Authority: UC Merced DA 207.
- This delegation supersedes UCM DA 208.
- This authority may NOT be re-delegated by you.

Sincerely,

LA\_1

Tom Hansford Interim Vice Provost for Academic Personnel

cc: Director Ethics and Compliance, Viola Kinsman

#### Attachment A List of Delegated Authority

#### Delegation of Authority - Administration of the Academic Personnel Program

The Associate Vice Provost in the Academic Personnel Office is delegated authority for:

- Designee for SVSH, abusive conduct/bullying and other complaint or investigation related activities
- Waiver of degree requirement for teaching appointments
- Designee for over 100% FTE appointments

The following chart outlines specific delegations to the department chairs, deans, Vice Chancellor for Research (ORUs), University Librarian (Library), and Associate Vice Provost. The Dean/Vice Chancellor for Research authorities may only be re-delegated to an associate dean or equivalent with prior approval from the Vice Provost for Academic Personnel. As an exception to normal delegation requirements, the dean may request from the Vice Provost to delegate the authority for Academic Student Employee recruitments, appointments and leaves of absence to the department chair with oversight provided by school staff. Those authorities that may not be re-delegated to an associate dean or equivalent are marked with an asterisk and notated.

When deans are considering re-delegation to associate deans, every attempt should be made for the approver of the Shortlist Report to be different from the hiring authority (appointment approver). As a best practice, the hiring authority, or potential hiring authority, should not be the approver of the Shortlist Report.

The Vice Provost for Academic Personnel retains authority for all exceptions to academic personnel policies.

<u>Recruitments</u>	Approver	
Search Plan - Senate	Dean	
Search Plan - Non-Senate - Schools and Office of Research	Dean/Vice Chancellor for Research	
Search Plan - Non-Senate - Library	Unit Director (Assoc Univ Librarian)	
Applicant Pool Report - Senate	Dean	
Applicant Pool Report - Non-Senate - Schools and Office of Research	Dean/Vice Chancellor for Research	
Applicant Pool Report - Non-Senate - Library	Unit Director (Assoc Univ Librarian)	
Shortlist Report - Senate	Associate Vice Provost	
Shortlist Report – Non-Senate - Schools and Office of Research	Dean/Vice Chancellor for Research	
Shortlist Report – Non-Senate - Library	Unit Director (Assoc Univ Librarian)	
Search Report - Senate	Dean	
Search Report - Non-Senate - Schools and Office of Research	Dean/Vice Chancellor for Research	
Search Report - Non-Senate - Library	Unit Director (Assoc Univ Librarian)	
Search Waivers - Senate	Approver	
Spousal/Partner Hire	Vice Provost for Academic Personnel	
Target of Excellence	Vice Provost for Academic Personnel	
President's and Chancellors' Postdoctoral Fellowship Recipients	Vice Provost for Academic Personnel	
Other	Vice Provost for Academic Personnel	
Search Waivers - Non-Senate/Other Academics	Approver	
Emergency Hire - Unit 18	Associate Vice Provost	
Emergency Hire - All other Non-Senate/Other Academics	Vice Provost for Academic Personnel	
Urgent Patient Care Need	Vice Provost for Academic Personnel	

Spousal/ Partner Hiremain hire must be a Senate member or in a senior leadership position (e.g., faculty administrator or SMG)	Vice Provost for Academic Personnel	
Continuation of Training	Vice Provost for Academic Personnel	
PI/Co-PI/Leadership Status	Vice Provost for Academic Personnel	
Research Team	Vice Provost for Academic Personnel	
Multiple Affiliated Employers	Vice Provost for Academic Personnel	
Other	Vice Provost for Academic Personnel	

Exempt Hires	Approver	
Category 1: Non-salaried (0% time) and Without Salary	Vice Provost for Academic Personnel	
(WOS) Appointments	vice provost for Academic Personner	
Category 2: Salaried Visiting Appointments	Vice Provost for Academic Personnel	
Category 3: Recall Appointments for Retired Academics	Vice Provost for Academic Personnel	
Category 4: Concurrent Academic Appointment	Follow appropriate appointment	
	delegation	
Category 5: Faculty Administrator Titles at Less Than 100%	Follow normal faculty administrator	
and Interim / Acting Positions	appt process	
Category 6: Lecturer in Summer Session	Follow normal summer sessions	
	hiring process	
Category 7: Internal Hires (Change in Series/Title)	Vice Provost for Academic Personnel	
Other	Vice Provost for Academic Personnel	

Appointment	Approver	
Assistant Professor, Steps I-III, including Acting; Assistant	Dean	
Teaching Professor, Steps I-III (LPSOE); including Acting	Dean	
Assistant Professor, Steps IV-VI;		
Assistant Teaching Professor, Steps IV-VI (LPSOE);	Vice Provost for Academic Personnel	
Acting in these series		
Associate/Full Professor, including Acting;		
Associate/Full Teaching Professor (LSOE/Sr. LSOE),	Provost	
including Acting		
Assistant Adjunct Professor, Steps I-III	Dean	
Assistant Adjunct Professor, Steps IV-VI	Vice Provost for Academic Personnel	
Associate/Full Adjunct Professor	Vice Provost for Academic Personnel	
Visiting Professor/ Visiting Professor Mathematics	Dean	
Assistant Professional Research, Steps I-III	Dean/Vice Chancellor for Research	
Assistant Professional Research, Steps IV-VI	Vice Provost for Academic Personnel	
Associate/Full Professional Research		
Project Scientist	Dean/Vice Chancellor for Research	
Specialist	Dean/Vice Chancellor for Research	
Continuing Educator	Dean	
Academic Coordinator	Vice Provost for Academic Personnel	
Academic Administrator I-III	Dean/Vice Chancellor for Research	
Academic Administrator IV-VII	Vice Provost for Academic Personnel	
Librarians	University Librarian	
Assistant/Associate University Librarian	Vice Provost for Academic Personnel	
University Extension Teacher	Dean	
Postdoctoral Scholar	Dean/Vice Chancellor for Research	
Academic Student Employee (Teaching Assistant, Teaching	Dean	
Fellow, Reader, Tutor)		

<u>Unit 18</u>	Approver	
Appointment	Dean	
Pre-six Assessment	Dean	
Pre-six Academic Review	Dean	
Excellence Review	Associate Vice Provost	
Continuing Lecturer Merit Reviews, except acceleration or		
denial	Dean	
Continuing Lecturer Merit Review, acceleration or denial	Associate Vice Provost	
Promotion to Sr. Continuing Lecturer	Associate Vice Provost	
Sr. Continuing Merit Review	Associate Vice Provost	
Merit	Approver	
Professor and Teaching Professor (LSOE), short form*	Dean	
Full Professor and Full Teaching Professor (LSOE), Step VI	Drevest	
and Above Scale	Provost	
Professor and Teaching Professor (LSOE), all other merits	Vice Provost for Academic Personnel	
Adjunct Professor, accelerations, Step VI and Above Scale	Vice Provost for Academic Personnel	
Adjunct Professor, all other merits	Dean	
Professional Research, accelerations, Step VI and Above Scale	Vice Provost for Academic Personnel	
Professional Research, all other merits	Dean/Vice Chancellor for Research	
Project Scientist, accelerations and Above Scale	Vice Provost for Academic Personnel	
Project Scientist, all other merits	Dean/Vice Chancellor for Research	
Specialist, accelerations and Above Scale	Vice Provost for Academic Personnel	
Specialist, all other merits	Dean/Vice Chancellor for Research	
Continuing Educator, accelerations and Above Scale	Vice Provost for Academic Personnel	
Continuing Educator, all other merits	Dean	
Academic Coordinator, accelerations and Above Scale	Vice Provost for Academic Personnel	
Academic Coordinator, all other merits	Dean/Vice Chancellor for Research	
Academic Administrator, accelerations and Above Scale	Vice Provost for Academic Personnel	
Academic Administrator, all other merits	Dean/Vice Chancellor for Research	
Librarians	University Librarian	
Assistant/Associate University Librarian	Vice Provost for Academic Personnel	
*Short form cases are normally expected to be routine, uncor however, there is a case in which the unit's faculty and the So	chool Dean disagree on the proposed	
action, the case will be forwarded to CAP for another level of Vice Provost for Academic Personnel for decision.		
Mid-Career Appraisal	Approver	
Professor and Teaching Professor (LSOE series), Adjunct		
Professor	Vice Provost for Academic Personnel	
Other Reviews	Approver	
All career equity reviews	Vice Provost for Academic Personnel	
Quinquennial review (five-year review)	Vice Provost for Academic Personnel	
Performance Improvement Plans (PIP)	Vice Provost for Academic Personnel	
Vice chair appointment/ reappointment/ five-year review	Department Chair	
Vice chair termination	Dean	
Department chair appointment/ reappointment/ five-year		
review/ termination	Dean*	
	Provost	

\*Dean authority may not be redelegated. Termination of a department chair prior to the end of their term requires consultation with the EVC/Provost.

Promotion	Approver	
Professor and Teaching Professor (LSOE series)	Provost*	
Adjunct Professor	Vice Provost for Academic Personnel	
Professional Research	Vice Provost for Academic Personnel	
Project Scientist	Vice Provost for Academic Personnel	
Specialist	Vice Provost for Academic Personnel	
Academic Administrator	Vice Provost for Academic Personnel	
Librarians	Vice Provost for Academic Personnel	
Assistant/Associate University Librarian (career status)	Vice Provost for Academic Personnel	
*The Chancellor retains authority to determine if an assistan		
Leaves of Absence	Approver	
ADNA 710 Sield Leeve (Medicel Leeve	Dean/Vice Chancellor for	
APM 710, Sick Leave/Medical Leave	Research/University Librarian	
APM 711, Reasonable Accommodation for Academic	Dean/Vice Chancellor for	
Appointees with Disabilities	Research/University Librarian	
	Dean/Vice Chancellor for	
APM 715, Leave of Absence/Family and Medical Leave	Research/University Librarian	
APM 730, Leave of Absence/Vacation	Dean/Vice Chancellor for	
APINI 730, Leave of Absence/Vacation	Research/University Librarian	
APM 740, Leave of Absence/Sabbatical Leaves	Dean	
APM 750, Leave of Absence/Leave for Service to	Vice Provost for Academic Personnel	
Governmental Agencies	Vice Provost for Academic Personner	
APM 751, Leave of Absence/Military Leave	Dean/Vice Chancellor for	
Arivi 751, Leave of Absence/Williary Leave	Research/University Librarian	
APM 752, Leaves of Absence/Leave to Attend Professional	Department Chair/Vice Chancellor for	
Meeting, 7 days or less	Research/University Librarian	
APM 752, Leaves of Absence/Leave to Attend Professional	Vice Provost for Academic Personnel	
Meeting, greater than 7 days		
APM 758, Leave of Absence/Other Leaves with Pay	Vice Provost for Academic Personnel	
APM 759, Leave of Absence/Other Leaves without Pay	Vice Provost for Academic Personnel	
APM 760, Family Accommodations for Childbearing and	Dean/Vice Chancellor for	
Childrearing	Research/University Librarian	
The Academic Personnel Office will continue to review all lea	ave and accommodation request to	
assure that they are consistent with University policies.		
Protected Research Time	Approver	
Course buyouts	Dean	
Summer Salary	Approver	
Non-Senate faculty Summer Teaching	Dean	
Senate Summer Teaching	Dean	
Relocation Expenses	Approver	
APM 550, 560, 561 and BFB G-13, Authority to authorize	Dean, unless retained by the Provost	
payment/exceptions of removal and moving expenses for	(see Academic Relocation and House	
academic appointees	, Hunting Guidelines)	
Faculty Recruitment Allowance (APM 190, Appendix E)	Provost	
	1	

One-time payments	Approver	
Multi-location one-time payments	Dean/Academic Personnel Office	
Campus one-time payments	Dean/Academic Personnel Office	
Note: Engagement in the activity requires dean pre-approval. Forms require final approval by Academic Personnel Office staff.		
Multi-location appointments	Approver	
Multi-location appointments	Follow appropriate appointment delegation	
Outside Professional Activities	<u>Approver</u>	
Annual Certification	Dean*	
Student Involvement	Dean*	
Category 1 Prior Approval	Associate Vice Provost	
Requests to exceed the maximum number of days	Vice Provost for Academic Personnel	
*Dean authority may not be re-delegated.	· ·	

#### University of California, Merced Academic Relocation & House Hunting Guidelines

#### **References:**

<u>Academic Personnel Manual (APM) 550</u> – RECRUITMENT, Moving Expenses for Intercampus Transfer

<u>Academic Personnel Manual (APM) 560</u> – RECRUITMENT, Removal Expenses/General

Academic Personnel Manual (APM) 561 – RECRUITMENT, Removal Expenses/Assistants

<u>Business and Finance Bulletin (BFB) G-13</u> - Policy and Regulations Governing Moving and Relocations

Business and Finance Bulletin (BFB) G-28 – Travel Regulations

**IRS Publication 521** - Moving Expenses

#### **RELOCATION (also known as removal or moving)**

Relocation expenses are not provided automatically, nor do they constitute a perquisite of University employment; they are paid in accordance with applicable policy and IRS regulations. The reimbursement of moving expenses is at the sole discretion of the University and is subject to the availability of funds. The University's payment of these expenses may be considered taxable income to be reported by the new employee and, if to be granted, must be included in the initial negotiations with the appointee regarding employment with the University.

The Provost/EVC will provide funding to reimburse the appointing School/College/ Department up to \$12,000 for relocation expenses for a single household and \$2,500 for professional office move. Relocation expenses for persons whose appointments are funded entirely from extramural funds, however, must be paid from non-State funds.

Appointees with any of the following title series or titles are eligible for payment of relocation expenses: Professor series, Lecturer with Security of Employment series, Assistant University Librarian, and Associate University Librarian.

If there is assurance an Acting appointee will be appointed in a regular rank within one year the appointee may be allowed relocation expenses.

Removal expenses for Teaching Assistants and Teaching Fellows are authorized as flat rates depending upon the point of origin of the authorized travel and without regard to actual expenses, in accordance with the schedule in APM - 561-18.

Appointees to the Professional Research series or Postdoctoral Scholar title may be reimbursed for removal expense if such payment is an allowable cost under the contract or grant.

Relocation expenses are granted to the household and not to the individual members, therefore reimbursement is based on the actual relocation expenses for any one household even though more than one member of the same household may at the same time be appointed to the University.

Relocation expenses are defined as the reasonable costs of moving household goods and personal effects to a new residence in Merced or adjacent counties. (Adjacent counties include: Stanislaus, Tuolumne, Mariposa, Madera, Fresno, San Benito, and Santa Clara.) UC Merced has contracted with moving vendors and the relocation process is coordinated Travel & Expense Management (E-mail: travel@ucmerced.edu). Reimbursement for relocation expenses will be processed and paid after the appointee's actual start date and determination of reimbursements that are taxable will be made in accordance with IRS regulations. (Taxable reimbursements will be processed though the payroll system for calculation and deduction of appropriate taxes. Non-taxable reimbursements may be processed using a CatBuy request.)

The relocation process cannot begin until the Academic Personnel Office has received the commitment/offer letter with the appointee's signature accepting the appointment. Appointees need to be aware that the entire process can take up to six to eight weeks and starting the planning process early is important. Appointees should be encouraged to prepare a full relocation plan as soon as possible upon accepting the appointment in order to provide sufficient time for review, approval, and coordination of the relocation activities. Preparation of a full relocation plan will also help avoid the submission of multiple requests and a piecemeal approach to the relocation.

Examples of allowable expenses include:

Packing, freight (but not storage), unpacking and insurance of household goods and personal effects, limited to one move per app household.

Air coach transportation for appointee and immediate family or an equivalent amount for other travel in accordance with standard airline fare polices and University travel regulations and supported by itemized receipts; including meals en route for appointee and immediate family (if travel is by automobile, the cost of meals is an allowable expense only to the extent that might have been necessary if travel had been by air coach).

Reimbursement of expenses incurred for relocation of the personal library belonging to a newly appointed faculty member is allowable only IF the library is to be made generally available to students and faculty at UC Merced.

Expenditures that are not allowed include expenses incurred for the assembly and disassembly of unusual items; reusable storage containers (e.g., plastic tubs or bins); relocation of animals (except household pets) or the costs associated with kenneling pets;

recreational vehicles; foodstuffs; building supplies; farm equipment; firewood; plants. A request for an exception must be submitted in writing and specify the purpose, circumstances or need, applicable dates, and the amount being requested. Any exception to policy must be approved in writing and the approval document must include either a specific amount or a statement regarding the maximum amount being approved (i.e., approved up to \$\_\_\_\_).

Relocation Activity <sup>1</sup>	<b>Exception Authority</b>
Reimbursement for over one-half the total cost for moving household goods and personal effects.	<b>Provost/EVC</b>
Payment of expenses incurred for picking up household items from locations other than the appointees home (as defined in IRS Pub. 521), from more than one physical location, or delivery of household items to more than one location.	Provost/EVC
Relocation to a non-adjacent county.	<b>Provost/EVC</b>
Reimbursement exceeding the allocated \$12,000 for relocation expenses for a single household and \$2,500 for professional office move when the additional funds will be charged to the appointee's start-up allocation.	Provost/EVC
Reimbursement of relocation expenses of the employee and members of his or her household not incurred within a year of the appointee's start date.	<b>Provost/EVC</b>
Actual and reasonable expenses related to relocating (shipping or driving) personal vehicles above and beyond the two allowed. (If the appointee decides to drive his or her personal vehicle, the appointee will be reimbursed at the mileage rate published in BFB G-28, Appendix A for the shortest route from current.)	Dean
Extension beyond the allowed 30 days of temporary lodging, including meals if the temporary lodging does not have cooking facilities.	Dean
Transportation of household pets consisting of domesticated animals normally kept or permitted in a residence.	Dean
Extension beyond the allowed 30 days of actual and reasonable storage for household goods immediately after their removal from the primary residence.	Dean
Using a vendor not included on the current UC Merced list of contracted vendors.	Dean
Expenses incurred for car rental in situations where the personal vehicle is <u>NOT</u> shipped.	Dean

<sup>1</sup> Reimbursement for expenses incurred under an exception may be taxable and shall be processed through a payroll transaction and not included on the purchasing request. Questions regarding the taxability of a specific request may be directed to staff in the School or Travel & Expense Management

#### **HOUSE-HUNTING**

The University of California, Merced will cover up to \$2,500 in travel expenses as allowed under University policy for a house-hunting trip to Merced and adjacent counties for appointees with a permanent, base funded, position. The reimbursement of house-hunting expenses is at the sole discretion of the University and is subject to the availability of funds. The University's payment of these expenses may be considered taxable income to be reported by the new employee and, if to be granted, must be included in the initial negotiations with the appointee regarding employment with the University.

Reimbursement for house-hunting will typically be funded using a portion of the funds allocated for recruitment related expenses.

In exceptional cases optional funding may be utilized. The Provost/EVC must approve use of alternative funds, especially in any case where a portion of start-up funds will be used to cover house-hunting related expenses.

Reimbursement will be provided through the appropriate processes after the appointee's actual start date and a reimbursement request supported by original, itemized receipts has been submitted.

A house-hunting trip should not exceed 2-3 days; however, an extension request can be submitted to the appropriate dean for approval.

#### **TEMPLATES**

A template Relocation – Policy and Procedure Summary and a template House Hunting Trip – Policy Summary are attached. It is recommended that a copy of these documents be provided to each eligible appointee with the offer/commitment letter.

#### Relocation - Policy and Procedure Summary

This summary is provided for quick reference only and is not a complete list of the University relocation policies. Reimbursement for relocation expenses will be processed and paid <u>after your actual start date and some reimbursements may be taxable</u> in accordance with IRS regulations (IRS Publication 521). **Original, itemized receipts are required for reimbursement.** 

## Your relocation and reimbursement must be completed within one (1) year after your official start date, as shown on your appointment letter.

## Household Goods/Furniture: Please contact Travel & Expense Management (E-mail: <u>travel@ucmerced.edu</u>) to arrange for a moving quote.

- If you select one of the UC Merced approved vendors, the cost for the move will be billed directly to your university account.
- If you select to use a non-UC Merced approved vendor, you will need prior approval from the Dean and you will need to pay the mover directly and seek reimbursement after your start-date and after the move is completed. <u>After</u> you receive the exception approval from the Dean and prior to signing the vendor contract, you will need to send the vendor estimate to Travel & Expense Management (E-mail: <u>travel@ucmerced.edu</u>) for review to confirm that all the estimated charges are reimbursable. After the move is completed, you will need to provide a detailed list of the items moved and the final paid invoice/receipt.

#### **Pet Transportation**

- If you need transportation for your household pet(s), please send an email to Dean
  \_\_\_\_ (c/o: \_\_\_\_\_) requesting an exception to policy. Please include:
  - What type of household pet(s) need to be transported.
  - The type of transportation that will be needed.
  - The estimated cost of the transportation.

#### Flights

Care should not be taken if using an online booking platform (e.g., Expedia, Travelocity) to ensure that an itemized receipt is received. Only coach class tickets are reimbursable. Reimbursement is allowable for your spouse/partner, as applicable, and the tickets need to be priced individually.

#### Car rental

Car rental is a reimbursable expense if the primary vehicle is being shipped. Care should be taken if using an online booking platform (e.g., Expedia, Travelocity) to ensure that an itemized receipt is received. An itemized, zero balance receipt with your name as the

contract holder will be required. Reimbursement will <u>not</u> be processed for large vehicles or upgrades, or additional insurance coverage.

#### Lodging

Care should be taken if using an online booking platform to ensure an itemized receipt is received. An itemized, zero balance receipt with your name will be required.

#### Meals

Reimbursement is for actual expenses, supported by original, itemized receipts, in accordance with current travel polices. Currently the maximum daily reimbursement rate is \$\_\_\_\_\_ per person. The University does not reimburse for the purchase of alcohol.

#### **Temporary housing**

If required after your move to the Merced area, please send an email to Dean \_\_\_\_\_ (c/o \_\_\_\_) providing the following information:

- The reason you will need temporary housing.
- The dates you will need temporary housing.
- The estimated cost for the temporary housing.
- If the temporary housing has a kitchen or not.

**Miscellaneous expenses** for such items as taxis, tolls, parking fees, checked bag fees, etc., are reimbursable when supported by original, itemized receipts.

# After your relocation is complete, please fill out the attached relocation reimbursement form and give all <u>original receipts</u> to \_\_\_\_\_\_ at the address below.

#### If you have any questions, please contact Travel & Expense Management or \_\_\_\_\_:

Megan Potts or Stacey Teixeira *Travel & Expense Management* University of California, Merced 5200 North Lake Road Merced, CA 95343 <u>travel@ucmerced.edu</u>

School Contact Name, Title School/College/Unit University of California, Merced 5200 North Lake Road Merced, CA 95343 Phone email address

#### TEMPLATE

#### House Hunting Trip – Policy Summary

This summary is provided for quick reference only and is not a complete list of the University policies. Reimbursement for relocation expenses will be processed and paid <u>after your actual start date and some expenses may be taxable</u> in accordance with IRS regulations. **Original, itemized receipts are required for reimbursement.** 

## Your house hunting trip and reimbursement must be completed within one (1) year after your official start date, as shown on your appointment letter.

#### Length of Trip

Should not exceed 2-3 days in the Merced area. However, if you will need additional time, please send an email request to Dean  $(c/o \_)$ .

#### Flights

Care should be taken if using an online booking platform (e.g., Expedia, Travelocity) to ensure that an itemized receipt is received. Only coach class tickets are reimbursable. Reimbursement is allowable for your spouse/partner and the tickets need to be priced individually.

#### **Car rental**

Care should be taken if using an online booking platform (e.g., Expedia, Travelocity) to ensure that an itemized receipt is received. An itemized, zero balance receipt with your name as the contract holder will be required. Reimbursement will <u>not</u> be processed for large vehicles or upgrades, or additional insurance coverage.

#### Lodging

Care should be taken if using an online booking platform to ensure that an itemized receipt is received. An itemized, zero balance receipt with your name is required.

There are several lodging options in the Merced area. Some are listed on this website: <u>https://www.ucmerced.edu/where-to-stay</u>. The University does not support or endorse any specific location. Please contact them directly to arrange your stay and inquire about a UC Merced room rate.

#### Meals

Reimbursement is for actual expenses, supported by original, itemized receipts, in accordance with current travel polices. Currently the maximum daily reimbursement rate is \$\_\_\_\_\_ per person. The University does not reimburse for the purchase of alcohol.

**Miscellaneous expenses** for such items as taxis, tolls, parking fees, checked bag fees, etc., are reimbursable when supported by original, itemized receipts.

#### Realtors

A list may be located by searching online for "Real Estate Agents" near "Merced, CA". There are several realtors and realty agencies in the area to choose from and the University does not support or endorse any agent or agency.

#### **Office setup**

Arrangement may be addressed during your visit. Please contact \_\_\_\_\_\_ to discuss your computer/equipment orders, cell phone plan, office setup, etc.

**After your house hunting trip is complete**, please fill out the attached house hunting trip reimbursement form and mail all **<u>original</u>**, **itemized receipts** to \_\_\_\_\_ at the address below.

If you have any questions, please contact:

Name Title School/College/Unit University of California, Merced 5200 North Lake Road Merced, CA 95343 Phone: (209) Email: