

University of California, Merced
Academic Relocation & House Hunting Guidelines

References:

[Academic Personnel Manual \(APM\) 550](#) – RECRUITMENT, Moving Expenses for Intercampus Transfer

[Academic Personnel Manual \(APM\) 560](#) – RECRUITMENT, Removal Expenses/General

[Academic Personnel Manual \(APM\) 561](#) – RECRUITMENT, Removal Expenses/Assistants

[Business and Finance Bulletin \(BFB\) G-13](#) - 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 through 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 ¹	Exception Authority
Reimbursement for over one-half the total cost for moving household goods and personal effects.	Provost/EVC
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.	Provost/EVC
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.	Provost/EVC
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

¹ 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.

TEMPLATE

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 after your actual start date and some reimbursements may be taxable 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: travel@ucmerced.edu) 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. After 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: travel@ucmerced.edu) 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 not 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 policies. 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 original receipts 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
travel@ucmerced.edu

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 after your actual start date and some expenses may be taxable 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 not 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: <https://www.ucmerced.edu/where-to-stay>. 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 policies. 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 **original, 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: