



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

April 25, 2025

DEAN, SCHOOL OF SOCIAL SCIENCE, HUMANITIES AND ARTS

DEAN, SCHOOL OF NATURAL SCIENCES

DEAN, SCHOOL OF ENGINEERING

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 Recruitments: Search Plan - Senate; Search Plan - Non-Senate; Applicant Pool Report - Senate; Applicant Pool Report - Non-Senate; Shortlist Report - Non-Senate; Search Report - Senate; Search Report - Non-Senate.
- The following Appointments: Assistant Professor, Steps I-III, including Acting; Assistant Teaching Professor, Steps I-III (LPSOE), including Acting; Assistant Adjunct Professor, Steps I-III; Visiting Professor/ Visiting Professor Mathematics; Assistant Professional Research, Steps I-III; Project Scientist; Specialist; Continuing Educator; Academic Administrator I-III; University Extension Teacher; Postdoctoral Scholar; Academic Student Employee (Teaching Assistant, Teaching Fellow, Reader, Tutor).
- Unit 18 Appointments, Pre-six Assessments, Pre-six Academic Reviews.
- 'Short Form' Merit increases for Professor and Teaching Professor.
  - Short Form cases are normally expected to be routine, uncomplicated one-step merit reviews. If, however, there should be a case in which the unit's faculty and the School Dean disagree on the proposed action, the case will be forwarded to CAP for another level of review and recommendation to the Vice Provost for Academic Personnel for decision.
- Merit increases for Adjunct Professor and Professional Research – other than authority to approve Accelerations, Step VI and Above Scale which is retained by the Vice Provost for Academic Personnel
- Merit increases for Project Scientist, Specialist, Continuing Educator, Academic Coordinator and Academic Administrator – other than authority to approve Accelerations and Above Scale which is retained by the Vice Provost for Academic Personnel
- APM 241 – Termination of vice chair prior to the end of their term
- APM 245 – Appointment, reappointment, five-year review of department chairs. In consultation with the EVC/Provost, the dean also has the authority to terminate a department chair prior to the end of their term.
- The following Leaves of Absence: APM 710, Sick Leave/ Medical Leave; APM 711, Reasonable Accommodation for Academic Appointees with Disabilities; APM 715, Leave of Absence/Family and Medical Leave; APM 730, Leave of Absence/Vacation; APM 740, Leave of Absence/Sabbatical Leaves; APM 751, Leave of Absence/Military Leave; APM 760, Family Accommodations for Childbearing and Childrearing.
- Protected Research Time/Course buyouts
- Summer Salary for Non-Senate faculty and Senate summer teaching
- Relocation Expenses - per APM 550, APM 560, APM 561, and BFB G-13:
  - Authority to approve payment/ exceptions of removal and moving expenses for academic appointees – except when retained by the Provost per the attached Academic Relocation and House Hunting Guidelines

- Multi-location one-time payments
  - Engagement in the activity requires dean pre-approval and consultation with APO for compliance with policy. Forms require final approval by Academic Personnel Office staff.
- The following Outside Professional Activities: Annual Certification; and Student Involvement.
- Source of Authority: **UC Merced DA 207.**
- **This delegation supersedes UCM DA 210A.**
- This authority may be redelegated by you to an Associate Dean or equivalent with prior approval from the Vice Provost for Academic Personnel, excepting the authority for 'Short Form' Merit Increase, appointment/reappointment/five year review of a Department Chair; Outside Professional Activities; and noted Relocation Activities which may NOT be redelegated by you.

Sincerely,



Tom Hansford  
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.

<b><u>Recruitments</u></b>	<b><u>Approver</u></b>
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)
<b><u>Search Waivers - Senate</u></b>	<b><u>Approver</u></b>
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
<b><u>Search Waivers - Non-Senate/Other Academics</u></b>	<b><u>Approver</u></b>
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 Hire--main 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
<b><u>Exempt Hires</u></b>	<b><u>Approver</u></b>
Category 1: Non-salaried (0% time) and Without Salary (WOS) Appointments	Vice Provost for Academic Personnel
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% and Interim / Acting Positions	Follow normal faculty administrator 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
<b><u>Appointment</u></b>	<b><u>Approver</u></b>
Assistant Professor, Steps I-III, including Acting; Assistant Teaching Professor, Steps I-III (LPSOE); including Acting	Dean
Assistant Professor, Steps IV-VI; Assistant Teaching Professor, Steps IV-VI (LPSOE); Acting in these series	Vice Provost for Academic Personnel
Associate/Full Professor, including Acting; Associate/Full Teaching Professor (LSOE/Sr. LSOE), including Acting	Provost
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	Vice Provost for Academic Personnel
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 Fellow, Reader, Tutor)	Dean

<b><u>Unit 18</u></b>	<b><u>Approver</u></b>
Appointment	Dean
Pre-six Assessment	Dean
Pre-six Academic Review	Dean
Excellence Review	Associate Vice Provost
All Continuing Lecturer Merit Reviews	Associate Vice Provost
Promotion to Sr. Continuing Lecturer	Associate Vice Provost
Sr. Continuing Merit Review	Associate Vice Provost
<b><u>Merit</u></b>	<b><u>Approver</u></b>
Professor and Teaching Professor (LSOE), short form*	Dean
Full Professor and Full Teaching Professor (LSOE), Step VI 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
<i>*Short form cases are normally expected to be routine, uncomplicated one-step merit reviews. If, however, there is a case in which the unit's faculty and the School Dean disagree on the proposed action, the case will be forwarded to CAP for another level of review and recommendation to the Vice Provost for Academic Personnel for decision.</i>	
<b><u>Mid-Career Appraisal</u></b>	<b><u>Approver</u></b>
Professor and Teaching Professor (LSOE series), Adjunct Professor	Vice Provost for Academic Personnel
<b><u>Other Reviews</u></b>	<b><u>Approver</u></b>
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*
Endowed chair appointment/ reappointment/ five-year review/ termination	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.*

<b><u>Promotion</u></b>		<b><u>Approver</u></b>	
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	
<i>*The Chancellor retains authority to determine if an assistant professor will not be reappointed.</i>			
<b><u>Leaves of Absence</u></b>		<b><u>Approver</u></b>	
APM 710, Sick Leave/Medical Leave		Dean/Vice Chancellor for Research/University Librarian	
APM 711, Reasonable Accommodation for Academic Appointees with Disabilities		Dean/Vice Chancellor for Research/University Librarian	
APM 715, Leave of Absence/Family and Medical Leave		Dean/Vice Chancellor for Research/University Librarian	
APM 730, Leave of Absence/Vacation		Dean/Vice Chancellor for Research/University Librarian	
APM 740, Leave of Absence/Sabbatical Leaves		Dean	
APM 750, Leave of Absence/Leave for Service to Governmental Agencies		Vice Provost for Academic Personnel	
APM 751, Leave of Absence/Military Leave		Dean/Vice Chancellor for Research/University Librarian	
APM 752, Leaves of Absence/Leave to Attend Professional Meeting, 7 days or less		Department Chair/Vice Chancellor for Research/University Librarian	
APM 752, Leaves of Absence/Leave to Attend Professional Meeting, greater than 7 days		Vice Provost for Academic Personnel	
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 Childrearing		Dean/Vice Chancellor for Research/University Librarian	
The Academic Personnel Office will continue to review all leave and accommodation request to assure that they are consistent with University policies.			
<b><u>Protected Research Time</u></b>		<b><u>Approver</u></b>	
Course buyouts		Dean	
<b><u>Summer Salary</u></b>		<b><u>Approver</u></b>	
Non-Senate faculty Summer Teaching		Dean	
Senate Summer Teaching		Dean	
<b><u>Relocation Expenses</u></b>		<b><u>Approver</u></b>	
APM 550, 560, 561 and BFB G-13, Authority to authorize payment/exceptions of removal and moving expenses for academic appointees		Dean, unless retained by the Provost (see Academic Relocation and House Hunting Guidelines)	
Faculty Recruitment Allowance (APM 190, Appendix E)		Provost	

<b><u>One-time payments</u></b>	<b><u>Approver</u></b>
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.	
<b><u>Multi-location appointments</u></b>	<b><u>Approver</u></b>
Multi-location appointments	Follow appropriate appointment delegation
<b><u>Outside Professional Activities</u></b>	<b><u>Approver</u></b>
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
<i>*Dean authority may not be re-delegated.</i>	

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

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

Relocation expenses are not provided automatically, nor do they constitute a prerequisite 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](mailto: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 \$\_\_\_\_).

<b>Relocation Activity <sup>1</sup></b>	<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.	<b>Provost/EVC</b>
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.	<b>Provost/EVC</b>
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.)	<b>Dean</b>
Extension beyond the allowed 30 days of temporary lodging, including meals if the temporary lodging does not have cooking facilities.	<b>Dean</b>
Transportation of household pets consisting of domesticated animals normally kept or permitted in a residence.	<b>Dean</b>
Extension beyond the allowed 30 days of actual and reasonable storage for household goods immediately after their removal from the primary residence.	<b>Dean</b>
Using a vendor not included on the current UC Merced list of contracted vendors.	<b>Dean</b>
Expenses incurred for car rental in situations where the personal vehicle is <u>NOT</u> shipped.	<b>Dean</b>

<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.

## 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](mailto: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](mailto: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](mailto: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: