

UC's Senior Management Group Moving & Relocation Expense Reimbursements Policy Summary

Welcome to UC! We encourage you to read UC's SMG reimbursement and other related policies thoroughly (see links below). The following are key points you should know about moving and relocation expense reimbursements. Please note effective January 1, 2018 **all** relocation expense reimbursements and payments are taxable to the employee, and SMG compensation and reimbursement are reported to the Regents and the public. Each offer package may differ; some of the items below may not be covered as reimbursable expenses in your offer letter. Please consider contacting one of the offices below *in advance* of finalizing any move plans.

House Hunting Trips

- UC reimburses *actual and reasonable* house hunting trip expenses as follows:
 - ❑ Up to two house hunting trips each for appointee and his/her spouse or domestic partner if provided in the offer letter; and
 - ❑ Travel expenses for transportation (coach airfare, car rental, parking fees, tolls, gas), meals and lodging (up to 10 nights)—see travel summary and links section.

Other Housing-Related Expenses

- UC reimburses *actual and reasonable* housing-related expenses, if provided in the offer letter, as follows:
 - ❑ Up to 90 days furnished temporary lodging, including residential parking fees; and
 - ❑ Up to 30 days of groceries for meals or if temporary lodging does not have cooking facilities up to 30 days of meal reimbursements; actual expenses capped at \$62/day/person—this is *not* a per diem.

Sale of Residence Costs or settlement of unexpired lease

- UC may reimburse actual and reasonable selling costs directly associated with the sale of the former primary residence.
- The University may reimburse actual and reasonable costs directly associated with the settlement of an unexpired lease of a former primary residence.
- Allowable expenses will be detailed in your offer letter.

Travel Reimbursement

- UC reimburses *actual and reasonable* travel expenses in accordance with UC travel reimbursement policy, G-28 (see link under *Policy links*). Please note the following:
 - ❑ Air travel must be coach class, no upgrades or higher-cost services;
 - ❑ Other transportation costs may be reimbursed, e.g., mileage, parking, gas, tolls
 - ❑ Car rental limited to intermediate size;
 - ❑ Actual meals and incidental expenses are capped at \$62/day—this is *not* a per diem; and
 - ❑ Lodging, room and taxes, up to limits described above.
- Keep all your receipts and make sure receipts indicate proof of payment.

Moving Expenses

- UC reimburses *actual and reasonable* moving expenses as follows:
 - ❑ One household move for household goods and personal effects, from the former *primary* residence to the new *primary* residence;
 - ❑ Up to two personal motor vehicles per household, but not motorized recreational vehicles;
 - ❑ Transportation of household pets, but not kenneling expenses;
 - ❑ Connecting and disconnecting utilities, but not refundable deposits;
 - ❑ Insurance for up to 30 days;
 - ❑ Storage costs for up to 90 days; and
 - ❑ Travel expenses for appointee and members of his/her household for transportation (coach airfare, mileage), meals and lodging (one night in the area of the former primary residence and one night in the area of the new primary residence)—see travel summary and links below.
- A household may be moved in more than one stage, if provided in the offer letter, but all stages must be completed within one year of the first day reporting to the new job.
- Up to two return trips to former primary residence may be reimbursed, if provided in the offer letter, for appointee to help with a move or because the appointee has been separated from household members for more than a month.
- *Appointees must use a common carrier from UC's preferred vendor list.*

Policy links

- Regents Policy 7710, *Senior Management Group Moving Reimbursement*
http://policy.ucop.edu/files/smg-docs/smg_move_reimburse.pdf
- Regents Policy 7711, *Senior Management Group Relocation Allowance*
http://policy.ucop.edu/files/smg-docs/smg_relocate_allow.pdf
- Business & Finance Bulletin G-13, *Policy and Regulations Governing Moving and Relocation*
<http://policy.ucop.edu/doc/3420347/BFB-G-13>
- Business & Finance Bulletin G-28, *Travel Regulations*
<http://policy.ucop.edu/doc/3420365/BFB-G-28>

Questions?

- Contact your OP Human Resources Business Partner
<http://www.ucop.edu/local-human-resources/staff-contacts/find-hr-business-partner.html>
- Contact the Business Resource Center CAAP Team
<http://www.ucop.edu/business-resource-center/teams/compliance-accounting-audit-policy/index.html>