

UC Davis Academic Personnel Manual

Recruitment

UCD Appendix III-A

Date: 6/22/99

Supersedes: 6/12/95

Responsible Department: Academic Personnel

Source Document: UC APM-550, APM-560, and APM-561

Exhibit A, Moving/Removal Expense Voucher

Exhibit B, Moving/Removal Expense Voucher (Teaching Assistants and Research Assistants)

I. Purpose

This section outlines UCD policy and procedures regarding the allowance for removal expenses that may be granted to new appointees in eligible title series and for moving expenses that may be granted to those eligible appointees who move from one campus or location to another at the request or direction of the University or who transfer permanently to another campus. This section supplements University policy set forth in Sections APM-550, APM-560, and APM-561.

II. Definitions

- A. Household goods--articles used for maintaining a household (e.g., appliances, furniture, artwork or other ornamental decorations, kitchen utensils, dishes, stereo equipment, clothing, hand tools, garden tools).
- B. Moving expenses--authorized expenses incurred by a continuing appointee in moving to a different campus at the request or direction of the University or by transfer.
- C. Removal expenses--authorized expenses incurred by an appointee newly hired to the University of California system in moving to the Davis area.

III. Policy

A. Removal expenses

Removal expenses are provided to new appointees in certain academic positions (refer to APM-560-14 and APM-561-14 for specific title series and titles) and must be a part of the initial negotiations with the appointee. Payment of removal expenses is not automatic and does not constitute a perquisite of University employment. Payment of these expenses is accorded to qualified persons in order to expand the geographic area for selection of permanent academic staff.

1. Removal expenses may be reimbursed to eligible personnel at one-half the total cost for expenses incurred from one of the following:
 - a. Household carrier expenses for packing, freight, insurance of household goods, loading, and unloading; or
 - b. Truck rental, gas, toll charges, boxes, tape, and personnel to assist with packing, loading, and unloading; or
 - c. Trailer and hitch rental, gas, toll charges, boxes, tape, and personnel to assist with packing, loading, and unloading; or

- d. Mailing expenses, boxes, and tape.

Storage fees and the cost of unpacking are not allowable expenses.

- 2. Removal expense reimbursement at one-half the total cost may also be received for the following:
 - a. One car, which may be moved by boat, train, moving van, or driver. Additional vehicles must be moved at the new appointee's expense.
 - b. One small animal (e.g., dog, cat), which may be transported by air or train. Expenses incurred for the purchase of a pet carrier and/or boarding fees are not reimbursable.
 - c. Rental of a hitch. If a hitch is purchased, reimbursement will equal only the cost of rental. The difference must be paid by the new appointee.
- 3. Transportation expenses may be reimbursed at one-half the total cost of one-way air coach transportation for the new appointee and immediate family.
- 4. New appointees may receive full reimbursement for removal of a personal library provided such library is made available to students and faculty. If the library is moved via household carrier or rented truck or trailer, reimbursement will be for actual weight, if known, or calculated as a percentage of the total. If the library is mailed, the cost of postage, boxes, and tape will be reimbursed. In some instances, removal of a laboratory with full reimbursement of costs may be authorized and paid for by the department.
- 5. Removal expenses for Teaching Assistants and Research Assistants who are appointed for three consecutive quarters (full academic year) at 50% time on General Funds may be paid at the flat rates listed in APM-561-18. Research Assistants whose appointments are funded by a grant or contract may be paid for removal expense at the flat rates only if allowed by the grant/contract. Prior approval of the Vice Provost--Academic Personnel is required for payments to Teaching Assistants and Research Assistants recruited from outside the United States.

B. Moving expenses

Moving expenses will be fully reimbursed for teaching faculty transferring permanently from one UC campus or laboratory to another and for other continuing academic appointees requested or ordered to move to another campus (refer to APM-550). Eligible appointees will receive full reimbursement for moving expenses incurred from the following categories:

- 1. Travel expenses for the appointee and immediate family in accordance with University travel regulations.
- 2. Packing, insurance, loading, unloading, and freight of the appointee's household goods.
- 3. Moving of a personal library provided such library is made available to students and faculty.

Refer to III-A, above, for descriptions of allowable expenses in these categories.

C. Source of funds

1. Removal expenses for General Funded (subfund GENFND) new appointees are paid from the local provision for removal expenses. The expenses are incurred in the hiring department's Operating Expense and Equipment (OE&E) budget, which is reimbursed from the provision administered by the Vice Provost--Academic Personnel.
2. Removal expenses for those appointees funded entirely from other than General Funds must be paid from non-General Fund sources.
3. Moving expenses resulting from an interlocation transfer are paid from the OE&E budget of the receiving department. If the position is General Funded, the department budget will be reimbursed from the local provision.
4. Any payment of removal expenses that exceeds the normal reimbursement must be funded by the hiring department or the appropriate dean's office. Since these payments are an exception to policy, prior approval must be obtained from the Vice Provost--Academic Personnel.

IV. Procedures

A. Purchase orders for moving vendors

If an appointee wishes to use a household carrier under contract with the University, the hiring department/ appointee must obtain an estimate of the cost. The hiring department should contact the Purchasing Department for the names of current contract vendors and requisition procedures. The carrier will provide copies of the estimate to the Purchasing Department and the hiring department. The department initiates a Purchase Requisition in DaFIS, then sends to the Office of the Provost a Cover Sheet for Purchase Requisition Attachments (see Policy & Procedure Manual Section 350-25, Exhibit A), along with a copy of the estimate. The Purchase Requisition must be approved by both the department head and the Vice Provost--Academic Personnel prior to submittal to the Purchasing Department.

B. Application for payment

1. Application for payment of moving and removal expenses is made on the Travel Expense Voucher, Form U85 (Exhibit A). Expenses must be supported by receipts. The department's travel agent from which the airfare quotation is obtained must be identified in the "Remarks" section of the voucher.
2. The application for payment of the removal expense allowance for Teaching Assistants and Research Assistants is made on a Travel Expense Voucher, Form U85 (Exhibit B). The following information must be stated on the form: point of origin, mileage to destination, and employment status (e.g., Teaching Assistant or Research Assistant, 50% time for academic year __-__).
3. Requests for payment of moving and removal expenses must be authorized by the department head and the appropriate dean's office, and approved by the Vice Provost--Academic Personnel. All exceptions to policy must have the prior approval of the Vice Provost--Academic Personnel. The department initiates the Travel Expense Voucher in DaFIS according to instructions in Policy & Procedure Manual Section 300-10 and sends

a paper copy and attachments to the Vice Provost--Academic Personnel, who will forward the approved materials to Accounting & Financial Services.

4. When the reimbursement check is issued, Accounting & Financial Services provides appointees with IRS Form 4782, Employee Moving Expense Information, to assist appointees in claiming deductions on State and Federal income tax returns. At calendar year end, the Accounting Office reports the reimbursement amount on the appointee's Form W-2, Wage and Tax Statement.

V. References and Related Policy

A. Academic Personnel Manual:

1. Section 550, Moving Expenses for Intercampus Transfer.
2. Section 560, Removal Expenses/General.
3. Section 561, Removal Expenses/Assistants.

B. Accounting Manual:

1. Chapter D-371-12.1, Disbursements: Accounting for and Tax Reporting of Payments Made Through the Vendor System.
2. Chapter D-371-16, Disbursements: Approvals Required.
3. Chapter D-371-36, Disbursements: Invoice Processing.

C. Business & Finance Bulletins:

1. G-13, Policy and Regulations Governing Moving and Relocation.
2. G-28, Policy and Regulations Governing Travel.

D. Policy & Procedure Manual Section 300-10, Travel Policies and Regulations.