



Policies & Procedures Manual

Office of Purchasing

5.0: Moving and Relocation Expense Reimbursement

Last Revised Date: 9/17/2007

Last Reviewed Date: 9/17/2007

Policy

Xavier University may reimburse reasonable relocation expenses for new faculty, professional employees, and administrators, as agreed in writing and subject to the terms of candidate offer letters. This policy applies only to individuals who are being employed for the first time and are required to relocate. Relocation of newly hired faculty, professional employees, and administrators is initiated by the hiring department and coordinated through the Office of Purchasing

The maximum moving expense reimbursement under this policy is \$3,000; reimbursement exceeding this amount must be approved by the President prior to making an offer.

Procedure

1. Notify Office of Purchasing

a. The hiring department is responsible for obtaining appropriate approvals and documenting the maximum moving expense reimbursement amount in the candidate offer letter.

b. The hiring department is to send a copy of the candidate letter offer, stating the maximum reimbursement amount, to the Office of Purchasing. Block or delete confidential salary or personal information contained in candidate offer letter.

2. Obtain Estimate of Moving Cost

a. New faculty, professional employees, and administrators contact the Office of Purchasing and request a list of preferred moving companies. Use of these companies is encouraged because competitive rates have been negotiated through University agreements. Contact the Office of Purchasing for more information, (513) 745-3676.

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b. New faculty, professional employees, and administrators should contact at least two moving companies, arrange for the company to inspect all items to be moved, and obtain cost estimates from the moving companies. Send copies of the cost estimates to the Office of Purchasing, fax (513) 745-3666.

c. The relocation bid estimate should include:

- Mileage to Destination
- Rate per 100 lbs. to destination
- Total estimated net weight of load
- Total charge for hauling to destination
- Cost of packing (including number of boxes; etc.)
- Cost of unpacking all items
- Insurance charge (declared value and rate)
- Normal appliance charge (disconnects and reconnects)
- Loading and unloading charges (if applicable)
- Grand Total estimated cost of moving charges

3. Select the Moving Company

The Office of Purchasing will send copies of the moving company estimates to the hiring department. The Office of Purchasing will review the cost estimates and facilitate selection of the mover with the hiring department and new faculty, professional employee, or administrator.

4. Issue Purchase Requisition

The hiring department will prepare a Purchase Requisition listing the moving company's name and the maximum amount to be paid. Send the approved and funded requisition to the Office of Purchasing.

5. Issue Purchase Order

The Office of Purchasing will issue a Purchase Order to the moving company stating the maximum amount to be paid by the University. A copy of the Purchase Order along with the Receiving Document will be sent to the hiring department. In the event the amount due to the moving company exceeds the amount agreed by the University, the new faculty, professional employee or administrator is responsible for paying the remaining balance to the moving company.

6. Complete Receiving Document

When the move has been completed, the hiring department signs the Receiving Document. Send the signed Receiving Document to Purchasing where it will be matched with the Invoice and processed through Accounts Payable for payment.

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7. New Employee Elects to Move Household Goods

- a. New faculty, professional employees, and administrators may elect to move their household goods themselves. In this event the faculty, professional employee, or administrator is responsible to arrange moving the household goods, paying the moving expenses, and submitting a request to the hiring department for reimbursement.
- b. Expense reimbursement limits, management approval, and funding requirements apply as described in this policy.
- c. Request reimbursement of moving expenses by using the [Xavier University Business and Travel Expense Report](#). All expenses must be supported by original receipts. Submit the expense report to the hiring department for approval.

8. Internal Revenue Regulations Regarding Moving Expenses

New faculty, professional employees, and administrators should familiarize themselves with current IRS regulations regarding tax treatment of certain moving expenses. The IRS classifies moving expenses as either *qualified* or *non-qualified*. Reimbursement of *non-qualified* expenses is subject to withholding of applicable income and employment taxes. Reimbursements are reported on the annual Form W-2. Refer to Internal Revenue Services Publication 521, *Moving Expenses*, available at: www.irs.gov.

9. Damaged Goods

- a. Damage to goods incurred during the move should be reported directly to the moving company immediately *in writing*. Retain all original packing materials and damaged items until the moving company or insurance adjuster has made an inspection.
- b. It is the responsibility of the faculty, professional employee, or administrator to file claims with the moving company and negotiate a settlement.

10. Excluded Items

- a. The University will not pay or share cost of moving special items including, but not limited to:
 - More than one automobile
 - Boats
 - Swimming Pools
 - Animals
 - Trailers
 - Firewood
 - Building materials
 - Playhouses
 - Plants

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b. The University will not pay any labor expense for removing or cleaning carpets or draperies; charges for disassembly or packing of complex items such as pool tables, athletic equipment, antennas, satellite dishes, etc.

c. The moving company is prohibited by law from accepting for shipment: liquor, combustible items including paints, solvents, ammunition, articles of extra-ordinary value, such as jewelry, wills stocks, deeds, stamp or coin collections, furs, and perishable plants and frozen foods.