DATE OF INITIAL ADOPTION AND EFFECTIVE DATE 9-9-05

APPLICABILITY/ACCOUNTABILITY

This policy applies to all university departments and units.

BACKGROUND

The university recognizes the potentially large upfront costs of moving when starting a position in a new location. This policy authorizes the payment of a relocation stipend to new employees required to relocate in order to commence employment with the university when it is determined that the expense is in the best interest of the university.

POLICY STATEMENT

Moving expense payments for household effects, relocation stipends up to a total of 15,000 pounds, ten percent (10%) of a new employee's salary are considered perquisites and can be made only upon prior approval by the appropriate vice president, provost, or designee. Moves, relocation stipends in excess of 15,000 pounds must be approved in advance by the president. The approval of moving expense requests, relocation stipends is not automatic and is granted only when it is determined that the expense is in the best interest of the university.

DEFINITIONS

Relocation Stipend. Household Goods. Personal effects and property of a current or
prospective employee. One-time cash payment made to an employee to assist in offsetting the costs of moving.

**Moving Expenses.** The cost of packing, shipping, and storing household goods and reasonable expenses incurred for moving an automobile for a current or prospective employee.

**PROCEDURES**

**Provisions**

1. Payment of *moving expenses for a relocation stipend* to an employee is a perquisite. No formal commitment to expend funds for the payment of *moving expenses* should be made unless prior written approval is obtained from the appropriate vice president, and/or provost, or designee.

2. Proposed moves of household goods up to a total of 15,000 pounds *Relocation stipends up to a total of ten percent of a new employee's salary* may be approved by the provost or appropriate vice president, provost, or designee. In addition, moves in excess of 15,000 pounds *Relocation stipends in excess of ten percent* and other exceptions must be approved by the president. All approvals must be obtained in writing in advance of the move.

3. Approvals must appear on the fully completed *Request to Pay Moving Expenses Salary Supplement Request Form*.

4. *Moving expenses Relocation stipends* paid by the university may be subject to income tax withholding in accordance with IRS the Internal Revenue Code and associated Treasury regulations.

**Procedures for the Requesting Department**

The State University System has a contract for employee domestic and international moves. An approved vendor from the SUS contract must be used for each move requested. Complete the Salary Supplement Request Form and submit to Payroll Services. Indicate on the form the payment is for “Non-Qualified Moving Expenses” and the description is “Relocation Stipend,” and indicate the requested payment timing.

1. The department/prospective employee need only select one of the contract vendors to arrange an estimate for the move. The department should then submit a purchase requisition that includes the estimate, detailed information concerning the move (place of origin, date of anticipated move, address, telephone numbers, name of the contact person), and approved Request for Approval to Pay Moving Expenses form.
2. The department may agree to pay the entire amount of the move or a fixed amount, with the employee paying the remainder. If the department agrees to pay a fixed amount, the purchase order will be issued for that portion of the fixed amount authorized by the department. The employee will be responsible for paying the difference between the amount authorized by the department and the actual total cost of the move.

Action by the Procurement Services Departments of Human Resources and Finance & Accounting Department

Upon receipt of the requisition and approved form, Payroll Procurement Services will process the form and either send the Vendor Payables a copy for payment or will include the stipend in the employee’s first paycheck. Send a scanned copy of the form to Finance & Accounting’s vendor payables. Vendor Payables will process the payment, as the employee will likely not be established in the payroll system at the time of the move. Issue a purchase order and notify the awarded carrier. The carrier will then set up a move date with the employee.

1. New employees are not authorized to place orders directly with moving vendors; but after receiving approval and a purchase order number from Procurement Services, the department hiring the new employee may give the purchase order number to the carrier.

2. Departments shall prepare paperwork well in advance to allow sufficient time to coordinate the move. This precaution is especially important for summer moves when carriers are busiest.

Special Provisions

Requests for moving laboratory equipment and professional books should be submitted on a separate requisition through the Procurement Services office. Household goods as defined above do not include professional equipment and/or books that are necessary for job performance and that will be housed at the university. The approximate value of items to be shipped should be indicated for insurance purposes.

1. Except for reassembly of furniture and appliance items, the unpacking of household goods is not an allowable moving expense.

FORMS

Salary Supplement Request Form
Request for Approval to Pay Moving Expenses

- Online Form
  http://hr.ucf.edu/files/SalarySupplementRequestForm.pdf
  https://purchasing.ucf.edu/guidelines-moving-expenses/
RELATED INFORMATION

Guidelines for Employee Moving Expenses https://purchasing.ucf.edu/guidelines-moving-expenses/

CONTACTS
UCF Human Resources – 407-823-2771
UCF Finance & Accounting - 407-882-1000
UCF Purchasing – 407-823-2661
UCF Human Resources – 407-823-2771

INITIATING AUTHORITY
Vice President for Administration and Finance and Chief Financial Officer

History 3-505 9/9/05, 3-505.1 9/15/2010, 3-505.2 1/4/2016