Relocation Expenses, 2.30 Policy Revision
Summary of Changes Effective February 1, 2022

Summary of Substantive Changes

- Adds a Relocation Expenses Standards table, which establishes the maximum amount of relocation and temporary housing expenses an eligible employee may receive.
- Adds a section which gives units discretion to authorize the use of unused temporary housing expenses for commercial moving and packing expenses.
- Revises policy to add specific standards regarding the length of time an employee may receive temporary housing, and adds a requirement that an employee who receives temporary housing must notify their unit within 30 days of obtaining permanent housing.
- Adds language which requires employees who have received relocation assistance to reimburse the university if they leave university employment within two years of their hire date.
- Adds detailed Procedure section.

Individual Substantive Changes

Policy (Page 1)
- Revises the policy statement.
- Moves sections from Policy Details regarding the type of payments an employee can receive to the Procedure Section to ensure consistency with the University Policy Template.
- Deletes cash advance option.

Definitions (Page 1)
- Adds a definitions table, with definitions for “Full-Time Equivalency (FTE),” “Senior Fiscal Officer,” and “Unit.”

Policy Details (Pages 1-2)
- Adds an Eligible Employees section. (Policy Details II, p. 1)
- Clarifies eligible relocation expenses and clarifies that relocation reimbursement will not be made to an employee prior to their hire or transfer date. (Policy Details III (B) and (C), pp. 1-2)
- Adds meals to house hunting expenses. (Policy Details III (C)(10)(b), p. 2)
- Adds a section detailing when temporary housing assistance begins and ends. The end date is, depending on the position, 6 or 12 months from the date of hire or transfer or, when the employee takes occupancy of a permanent residence, whichever occurs earlier. (Policy Details III (C)(11), p. 2)
- Replaces “unit” with “unit Dean/VP” as having discretion to authorize the use of unused temporary housing assistance referenced in the offer letter to be used for other eligible relocation expenses enumerated in Policy Details III(C)(1 & 2) of the policy. (Policy Details III (C)(3), p. 2)
- Clarifies and updates ineligible relocation expenses section. (Policy Details IV, pp. 2-3)
- Adds section requiring unit hiring managers to consult with Talent Acquisition to discuss proposed reimbursement amounts for relocation expenses, and that the expenses should be consistent with the Relocation allowance Reimbursement Standards. (Policy Details V, p. 3)
- Adds section regarding taxability of payments and reimbursements for relocation expenses. (Policy Details VI, p. 3)

(Continued on page 2)
 Adds a section requiring an employee who leaves the university, voluntarily or involuntarily, within two years of the employee’s hire or transfer date, to reimburse the university for relocation assistance the employee received. The reimbursement amount is prorated based on the date the employee separates from the university. (Policy Details, VII, p. 3)

**Procedure (Pages 2-5)**

- Adds a Relocation Expenses section (Procedure I, pp. 3-4)
- Adds a Negotiation section that sets forth detailed procedures for unit hiring managers to follow to request a reimbursement allowance. The procedure differs based on whether the requested relocation reimbursement allowance does or does not exceed the Relocation Allowance Reimbursement Standards. Relocation reimbursement allowance requests that exceed the Standards require the Dean/VP to sign and submit a rationale for the request, discuss the proposed amount with Talent Acquisition, and to sign the request to acknowledge their approval of the amount that will be provided to the eligible employee. (Procedure I (A & B), pp. 3-4)
- Adds an Offer Letter section to add language that the maximum relocation assistance in offer letters must align with the Relocation Allowance Reimbursement Standards or with the amount approved by the Dean/VP on the Relocation Allowance Reimbursement Request. (Procedure I (B)(1), p. 4)
- Adds a Vendor and Direct Billing section and removes most references to “Payroll Services” within the Procedures section and transfers the accompanying responsibilities to Talent Acquisition. (Procedure, pp. 4-5)
- Changes “Talent Services” to Talent Acquisition throughout the Procedures section. (Procedure, pp. 4-5)
- Adds a Temporary Housing section, which requires an employee who receives temporary housing as part of their relocation assistance to provide notice to the unit no later than 15 days after the employee takes occupancy of a permanent residence. The section also states that employees who fail to provide notice could be subject to corrective action and/or the university could take action to obtain reimbursement from the employee for the temporary housing assistance provided after the employee had obtained permanent housing. (Procedure III, p. 5)
- Adds an Obtaining Reimbursement section and deletes language regarding Payroll Services retaining reimbursement documentation for audit purposes. (Procedure IV, p. 5)

**Responsibilities (Pages 5-6)**

- Updates the Responsibilities table to reflect the transfer of “Payroll Services” responsibilities to Talent Acquisition. (Responsibilities, pp. 5-6)

**Resources (Page 6)**

- Lists all resources and removes defunct IRS Moving Expenses link. (Resources, p. 6)

**Contacts (Pages 6-7)**

- Adds HR Connection contact information.