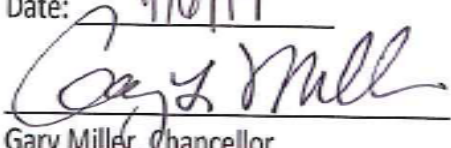




Approved by: Chancellors Cabinet  
Date: 9/6/17  
  
Gary Miller, Chancellor

## EMPLOYEE RELOCATION EXPENSE POLICY HR 14-17-2

### PURPOSE

The purpose of the Employee Relocation Expense Policy is to provide guidance to the UW-Green Bay hiring authorities regarding reimbursement for relocation expenses incurred by newly hired employees. This policy provides further clarification of the [UW System Administrative Policy 240: Relocation \(Household Moves\) and Temporary or Indefinite Work Assignments](#).

### DEFINITIONS

“Direct Costs” include any directly incurred costs as part of a household move that are allowable under UWS Policy 240. Original receipts must be submitted to receive reimbursement for direct costs. Examples of direct costs of relocating household goods include:

- appliance service
- packing and unpacking
- containers
- additional transportation at origin and destination
- fuel/insurance surcharge (This is not a charge the employee has control over.)
- line haul charge (rate per 100 lbs. x pounds moved)
- seasonal rate adjustment
- weight and bulky articles charges
- third party services (see Section C.3) associated with crating, uncrating, assembling, or disassembling typical household items such as a pool table, appliances, clocks, hot tubs, and televisions
- ferry, bridge, ramp, and shuttle service charge

“Incidental Costs” are expenses including fees and tips for porters, baggage handlers and other personal services or effects. The following incidental costs associated with relocation may be a reason to provide a stipend payment:

- costs associated with relocating items that are not considered household goods
- third party services for swing sets, jungle gyms, and other outdoor items
- travel costs enroute (meals, lodging, tolls, etc.)
- auto hauling or towing
- service charges for expedited services



- house hunting
- valuation/additional insurance
- extra pickup and/or delivery of household goods
- storage for the convenience of the employee
- warehouse handling
- weight and bulky articles charges for items not considered household goods
- overtime loading or unloading required by customer

“Household Goods” are personal effects of the employee and the immediate family of the employee. Examples include furniture, clothing, musical instruments, household appliances, food, and other items which are usual and necessary for the maintenance of a household and which may be transported legally in interstate commerce. It is the employee’s responsibility to consult with the Controller’s office prior to moving the item(s) to determine whether the item(s) are classified as household goods. The following items are not considered household goods:

- property for resale
- property not owned by the family
- farm equipment
- livestock
- trucks/trailers
- boats over 14 feet
- automobiles, motorcycles, recreational vehicles
- building materials
- items used in a personal business
- pets, flammable items, caustic aerosols, spoilable items, plants, jewelry, frozen food, etc., and other items that might be found in a household but which the carrier cannot or will not allow to be placed in the moving van
- swing sets, jungle gyms, and other similar outdoor items

“Stipends” are taxable lump payments made to an employee to assist with moving expenses.

## **POLICY**

### **A. Eligibility**

Reimbursement of relocation expenses for new employees including Faculty, Academic Staff, Limited and University staff may be authorized and funded through the hiring department. Reimbursement is not allowed for employees appointed as Academic or University Staff temporary or project. Relocation and submission of reimbursements must be completed no later than one year from the hire date.

### **B. Reimbursement Amounts**

Maximum allowable amounts for reimbursement are as follows:

1. Faculty, Academic Staff and University Staff
  - a. Former residence must be at least 50 miles from the university.



- b. Direct costs of relocation are reimbursable up to \$2,000.
- c. In addition to direct costs, stipend payments of up to \$1,000 may be granted for indirect/incidental costs of relocation.

## 2. Positions titled Director or above

- a. The former residence must be at least 50 miles from the university.
- b. Direct costs of relocation are reimbursable up to \$4,000. Exceptions to this limit may be granted by the Area Leader/Hiring Authority responsible for hire.
- c. In addition to direct costs, a stipend payment of up to \$1,000 may be granted for indirect/incidental costs of relocation.

### **C. Relocation Using Commercial Carriers**

UW System Financial Administration has contracts established with [various commercial carriers](#) for the relocation of household goods for university employees. If one of these carriers is not used and the moving expense allowance exceeds \$3,000, estimates from a minimum of three vendors must be obtained and submitted with the reimbursement request. Reimbursement is allowed up to the lowest of the three estimates amounts provided the bill of lading and estimates are submitted.

### **D. Relocation Without Using Commercial Carriers (Self-Moves)**

An employee can elect to relocate themselves. Reimbursement for a self-move relocation is limited to the actual, reasonable, and necessary costs for any hired labor in loading and unloading the household goods and for the rental of trucks, trailers, moving equipment, or other expenses directly related to the relocation. Neither the employee nor the employee's spouse or dependents may be reimbursed for their labor. The reimbursement request must be supported by original receipts. Estimates are not required from commercial carriers to support self-moves.

### **E. Relocation on a Piecemeal Basis**

The total cumulative reimbursed cost of moving household goods on a piecemeal basis may not exceed the amount which would have been charged if the relocation had been accomplished in one trip. To make that determination, an estimate showing the cost to accomplish the move in one trip should be obtained and submitted with the reimbursement request.

### **F. Transporting the Employee and Family**

The amount of reimbursement for transporting the employee and their immediate family from the former residence to the new residence may not exceed the cost of mileage for one automobile at the federal mileage rate effective at the time of the move. Mileage should be based on the most direct route and should not exceed the mileage indicated on the bill of lading when a commercial carrier is utilized. Mileage reimbursement is a direct cost of relocation.

## **REFERENCES & RESOURCES**



# UNIVERSITY of WISCONSIN-GREEN BAY

[UW System Administrative Policy 240: Relocation \(Household Moves\) and Temporary or Indefinite Work Assignments](#)

[University Travel Policies- Regent Policy 21-5](#)

[Internal Revenue Service Publication 521: Moving Expenses](#)