

OAKLAND UNIVERSITY

ADMINISTRATIVE POLICIES AND PROCEDURES

257 MOVING EXPENSES

SUBJECT: MOVING EXPENSES

NUMBER: 257

AUTHORIZING BODY: STRATEGY COUNCIL

RESPONSIBLE OFFICE: VICE PRESIDENT FOR FINANCE AND
ADMINISTRATION

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RATIONALE: To provide guidelines for the eligibility, approval, and reimbursement of employee moving expenses. Moving expense reimbursement should only be provided for competitive recruitment purposes to attract qualified candidates.

POLICY: Oakland University (University) will, with pre-approval from the department's respective Executive Officer, reimburse reasonable and appropriate moving expenses for certain new employees as noted below.

The new employee's commute to the University from their previous residence must be at least 50 miles greater than their previous commute to their former job location.

Moving expenses must be incurred within one year of the employee start date.

The maximum allowable reimbursement is determined by the employee's classification.

Moving expenses must be funded within the hiring unit's resources.

Moving Expenses for new Executive Officers, Deans, Academic Administrators, full-time tenure track faculty, coaches and Administrative Professionals (in salary band S or higher or equivalent Individual Contract Full-time (IF) positions) may be reimbursed up to a maximum of \$10,000.

All reimbursable moving expenses are considered taxable income and will be subject to all appropriate withholdings for federal, state, and local taxes in accordance with the University's regular payroll practices.

SCOPE AND APPLICABILITY: New employees who meet the criteria listed above.

DEFINITIONS:

Academic Administrator: An academic employee such as an associate dean, associate provost, or academic director as defined by the e-class AA.

Administrative Professional: A professional staff member (AP) as defined by the e-class PF.

Executive Officer: President, Vice President or others defined by the e-class EE.

PROCEDURES:

The hiring supervisor shall obtain written pre-approval to reimburse moving expenses from the respective Executive Officer. The approved moving expense reimbursement shall be included in the employment offer letter.

Not all moving expenses are reimbursable.

All employees receiving moving expense reimbursement must complete a Moving Expense Reimbursement Summary form. This form will document detailed reimbursable expenses and require certification from the employee. Explanation and examples of reimbursable expenses are provided in the instructions tab of the Moving Expense Reimbursement Summary form and are listed below.

Reimbursable Expenses

Some expenses an employee may incur in the moving process are eligible for reimbursement. Examples of these types of expenses include, but are not limited to, the following:

Cost of transporting household goods and personal effects

- Cost of a moving company
- Cost of a truck rental in a self directed move

- Actual fuel expenses in a self directed move, (the move must follow the shortest most direct route)
- Parking fees and tolls while in transit
- The cost of packing, crating, and transporting household goods
- The cost of shipping the Employee's car and household pets to the new home
- The cost of storing and insuring household goods within any period of 30 consecutive days after the Employee's belongings are moved from the former home and before they are delivered to the new home.
- Travel expenses for the Employee & members of household (one trip per person, and you do not have to travel together or at the same time)
- Airfare (coach as noted in OU Travel Policy 1200)
- Lodging (one night at the old location, while in transit & one night upon arrival)
- The standard federal mileage reimbursement rate
- Parking fees and tolls while in transit
- Pre-move house hunting expenses (limited to one trip from the current home to OU and back)

Non-Reimbursable Expenses

There are certain expenses an employee may incur in the moving process which are ineligible for reimbursement including, but not limited to, the following:

- Vehicle registration fees
- Driver's license fees
- Expenses related to buying or selling a home
- Home improvements to sell previous home
- Home improvements for new home
- Meals for family members
- Mortgage penalties

- Real estate taxes
- Security deposits
- Loss on sale of previous home
- Loss from disposing of memberships
- Expenses related to breaking a lease
- Cable TV connection/disconnect related fees
- Return trips to your former residence
- Additional pre-move house hunting trips (limited to one trip)
- Expenses related to side trips, stop overs, etc. while moving. Only direct route expenses will be considered
- Rental car upon arrival to OU
- Temporary living expenses upon arrival to OU beyond the one night stay
- Storage of Employee's belongings for more than 30 days
- Trip back to prior home for real estate closing

Reimbursement Process

Moving expenses must be paid by the employee. Direct payment of an employee's moving expenses by the University is not allowable.

To reimburse the employee, the department must complete a Payment Voucher (PV) using account code K069 and attach the following:

- a complete and signed Moving Expense Reimbursement Summary
- Pre-approval by the Executive Officer
- original itemized receipts
- a copy of the employment offer letter

All documentation must be sent to the Accounts Payable Office.

Repayment

In the event an employee who has received moving expense reimbursement terminates or resigns employment within twelve (12) months of his/her employment date, the employee will be responsible for repaying the entire reimbursement amount to the University.

RELATED POLICIES AND FORMS:

Payment Voucher

Moving Expense Reimbursement Summary Form

OU AP&P #1200 Travel

APPENDIX: