

## Relocation Assistance

The University may provide relocation assistance to new employees depending upon circumstances. This assistance is not intended or expected to cover the full cost of a move. Assistance is provided as reimbursement for substantiated, qualified expenses incurred within 12-months of the first day of work and **will not be paid until after the first day of work** (or the until submission of a properly documented payment request, whichever is **later**). The specific amount of the assistance, if any, will be stated in the employee's appointment or salary letter and is limited to the stated amount.

For an employee to receive relocation assistance, the following conditions must be met:

- The employee's commute from their pre-move home to the new work location must be at least 50 miles farther than the commute to old work location.
- The move and all costs must be incurred within 12 months of the start date at the new location.
- The employee must work at least 39 weeks for U.P. within one year of the move. If the employee fails to meet this test (e.g. is terminated before having worked 39 weeks), any relocation assistance paid becomes taxable to the employee. *Note: In the case of faculty and other employees whose normal work calendar is less than 39 weeks in a year, this test is waived.*

### *Qualified expenses include:*

- Transportation charges for one continuous move of household items from the primary residence to the new residence, along with related packing and container costs.
- One trip by personal vehicle may be included to move the employee and the employee's family. Qualified expenses for this single trip include lodging (one night per every 500 miles on the most direct route plus one night at point of origin) and mileage costs, which will be paid at the federal mileage rate for relocation.
- Storage of household goods (maximum of 30 days) prior to occupancy of a new permanent residence.

### *The following are NOT allowable expenses:*

- Expenses for meals during the move.
- Expenses related to buying or selling a home, terminating leases, etc.
- Pre-move house-hunting costs.

- Non-professional movers (friends, family, etc.).

All expenses (except mileage) must be substantiated with a receipt before reimbursement can be made. To be properly documented under IRS accountable-plan rules, the request must identify who was paid, what the expense was for, when it was incurred, where it was incurred (in the case of lodging), why it was related to the move, and how much it cost. The University will not make payments directly to vendors for personal moving expenses. The Oregon Association of Independent Colleges and Universities maintains discounted contracts with several moving companies. Contact Theresa Knott in the Controller's Office ([knott@up.edu](mailto:knott@up.edu), x8712) for the current list of preferred vendors.