



Policy Title: **Relocation Expenses**

Policy Number: PS 411

Purpose of Policy: To establish definitions and levels of reimbursement for moving expenses.

Applies to: All Faculty and Staff

Policy Statement:

1. **General:** Bellevue University may reimburse newly hired or current faculty and administrative staff and those employees who accept positions or transfers at the University which require them to relocate.
2. **Eligible employees:** Reimbursement is made under this policy in the sole discretion of management only for those moves that meet the following:
  - a. The moving expenses must be incurred within one year of the date the employee first reports to work at the new location.
  - b. The distance from the employee's new home to the new job location must be less than the distance of the employee's former home to the new job location.
  - c. The employee moves from their current place of residence to a location more than 50 miles away.
  - d. The employee must sign a Relocation Agreement as outlined below.
3. **Reimbursement Authorization:** All relocation requests must be approved by the appropriate senior manager and the University President prior to the initiation of any relocation activity. Reimbursement is discretionary based on current business needs and must be requested by the appropriate senior manager and approved by the University President.
4. **Required Documentation:** Reimbursements requests must be submitted by the end of the calendar month following the month in which they are incurred (*example: expenses incurred any time in January, must be submitted for reimbursement by the last day of*

*February*). The employee requesting reimbursement must submit a Payment Request Form and supporting documentation to obtain reimbursement. Itemized receipts must be provided for all reimbursement requests. Missing Receipt Affidavits will not be accepted as supporting documentation. An individual may not approve his/her own travel reimbursement. The Payment Request Form must be signed by the employee's manager or director.

5. **Allowable Expenses:** Reimbursement is allowed for reasonable expenses as follows:

- a. **Moving expenses:** The cost of packing, crating, and transporting household goods and personal effects of the employee and members of his/her household from the former home to the new home. This may include the following:
  - i. If the employee uses his/her own vehicle to move household goods and personal effects, reimbursement will be provided at a standard mileage reimbursement rate for travel approved under this section. This mileage rate is inclusive of all vehicle-related expenses, including but not limited to fuel, wear and tear, and personal auto insurance. Mileage will be reimbursed at the rate established by the U.S. General Services Administration. These mileage rates are published on the GSA website at: <https://www.gsa.gov/travel/plan-book/transportation-airfare-rates-pov-rates-etc/privately-owned-vehicle-pov-mileage-reimbursement-rates>. No other expenses are reimbursable.
  - ii. The actual cost of renting a moving van or truck which the employee drives him/herself, along with actual fuel expenses.
  - iii. The actual cost of moving expenses paid to a moving company or service.
  - iv. Storage and related insurance expenses for up to 30 consecutive days after the day the items are moved from the former home prior to delivery to the new home.
- b. **Travel expenses:** The actual cost of transportation and lodging for the employee and members of his/her household while traveling from the former home to the new home for the time period beginning on the day travel begins up to and including the day of arrival at the new place of residence. Only one trip per person is reimbursable.
  - i. For travel by personal vehicle, reimbursement will be provided at the standard mileage rate noted above. No other expenses are reimbursable.
  - ii. For travel by air, train, or other common carrier, the actual cost of the most economic class of travel along with actual baggage fees will be reimbursed. No other expenses are reimbursable.

- iii. Reasonable lodging expenses necessitated by travel. Lodging may not exceed \$250 per night without approval of the University President.
  - c. **Meal expenses:** The actual cost of meals for the employee and members of his/her household while traveling from the former home to the new home for the time period beginning on the day travel begins up to and including the day of arrival at the new place of residence. Meal expenses are allowed only up to the per diem limits established by the U.S. General Services Administration. These per diem rates are published on the GSA website at: <http://www.gsa.gov/portal/category/21287>. The limits posted on this website are per person and will include any and all tips up to 20% of the bill. Please be advised that the first and last day of travel is limited to 75% of the per diem amount.
  - d. **Other expenses:** Other expenses not expressly listed in this policy will be reimbursed only with approval of the University President.
6. **Reimbursement Limit:** Relocation reimbursements generally may not exceed the maximum reimbursement amount of \$5,000. Exceptions will be made only with approval of the University President.
7. **Relocation Agreement:**
- a. To be eligible for relocation benefits, employees are required to sign a Relocation Repayment Agreement. An employee who relocates and voluntarily terminates employment or is terminated for cause within a two-year period will be required to refund all or part of the monies spent by the University. The repayment amount will be determined by the number of months employed by Bellevue University during the first 24 month period after the start date in the new position based on the following formula; 100% repayment during the first 0 - 12 months; 75% repayment during months 13 – 16 months; 50% repayment during months 17 – 20 and 25% repayment during months 21 – 24. The employee is responsible for reimbursing Bellevue University for any balance due on or before the last day of employment. Upon termination of employment, Bellevue University shall have the right to apply, to the extent allowable under law, all net or "take home" wages and other payments due or thereafter becoming due to the employee in satisfaction of the employee's obligation to reimburse Bellevue University for the expenses.
  - b. If an employee is involuntarily terminated (for any reason other than cause), the employee will not be responsible for repayment of any relocation expenses, regardless of the duration of employment at the new location.

**NOTE: RELOCATION BENEFITS WILL NOT BEGIN UNTIL A REPAYMENT AGREEMENT HAS BEEN SIGNED.**

8. **Tax Obligations:** Bellevue University reports reimbursement of relocation expenses for tax purposes and withholds taxes as required by state and federal law.
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Supporting Documentation: Relocation Repayment Agreement, Employee Handbook

Keywords: employee, relocation, reimbursement, moving, expenses

Responsible Office: Finance Office

Contact Information: Finance Office  
402-557-7087

Approved by: Dr. Mary Hawkins

Effective Date: January 31, 2018

Review Cycle and Dates: This policy statement supersedes previous versions of PS 411, dated January 14, 2005 and December 1, 1996.

APPROVED:

/signed/  
Dr. Mary Hawkins, Bellevue University President

1/31/2018  
Date