Household Move Policies & Procedures

Basic Info:

- The library typically offers moving expenses as part of the recruitment package for incoming faculty and on occasion for non-faculty positions. Generally the allotment is $3,000.

- The incoming employee may use UF's moving contract *or* may choose to do a self-move, which means that they pay out of pocket and are reimbursed for allowable expenses upon arrival and submission of receipts.
    - ***Note:*** *Self Move is defined as a move using other means than UF's contracted vendors to provide service. This includes other national or local professional moving companies, as well as truck rentals/etc. Expense are paid out of pocket by the incoming employee and then reimbursed as soon as administratively feasible upon the processing of receipts.*

- Expenses beyond the allotment indicated in the letter of offer are the responsibility of the individual to pay directly to the UF-contracted moving company.

- If a UF-contracted mover is used, the library Purchasing Agent interfaces with UF Purchasing to get information to vendor and arrange move.

- If expense of the move is less than allotted amount, the remainder may be applied towards move-related travel expenditures as permissible per UF regulations and policies.

- **Note:** Regardless of how the move is conducted, UF will not permit reimbursement or payment for any insurance on household goods.

Pre-Move Procedure:

1. The "Request for Approval to Pay Moving Expenses" form is provided by library Human Resources along with new hire contact information (including address, phone number(s), and email address). Form must be signed by the Dean or designee.

2. The library Purchasing Agent will initiate contact with incoming faculty via email or phone call to establish which process (self move, or move by UF-contracted mover) is preferred and intended. The Purchasing Agent will provide UF moving information via email.
    a. If Self Move is preferred/intended, the Purchasing Agent will provide UF Self Move Guidelines.

3. The Purchasing Agent will provide the "Request for Approval to Pay Moving Expenses" form and contact information to UF Purchasing at 392-8837 or email (scan) ghale@ufl.edu. The Purchasing Agent will indicate whether move is a Self Move or a UF-contracted move. Purchasing will then assign and interface with contracted moving vendor to arrange contact between moving company and incoming faculty member.

Post-Move Procedure:

- ✓ *Self Move:* Incoming faculty member is responsible for providing original receipts to initiate reimbursement process. Once receipts have been provided, they are submitted by the library Purchasing Agent to University Tax Services for review and determination of the method of payment. A cover sheet should be included and can be found here. A copy should be kept and filed into the "Additional Pay" and/or "Household Moves" folder for current year which is maintained by the library Purchasing Agent. Typically, a payment will be made to the employee through payroll in the form of an additional payment line. Once UF Tax Services has indicated that reimbursement request has been approved, payment status can be verified in payroll by library Human Resources or Fiscal Services.

- ✓ *UF-contracted Move:* The library Purchasing Agent will process invoice against Purchase Order previously set up. Typically these invoices are sent 30 days after the move has taken place. The library Purchasing Agent will review the invoice and verify that insurance has not been charged. Payment is then authorized by the library Purchasing Agent for allotted amount only. If amount is greater than allotted amount, the library Purchasing Agent will provide the employee a copy of the invoice so that they may arrange payment for the difference.

- ✓ *Move-related travel expenses:* If contracted move or self-move reimbursement is less than library-allotted amount, remainder may be used for move-related travel expenditures. Receipts are turned into library Human Resources by the employee for processing.