College HR Process: Relocation Allowance	
Contact: College HR Services Team and College Financial Services Team	**Last Updated:** 4/10/19

Description:

The Relocation Allowance for EHRA employees encompasses moving expenses, house-hunting trips and temporary housing for full-time, permanent EHRA positions who are relocating at least 100 miles.

- The allocation is fully taxable as income. Even though it will be paid via Financials, the allocation amount will be included as imputed income and payroll taxes will be deducted in the employee's next paycheck.
- Only discretionary funds can be used for the allowance payment.
- The maximum amounts are as follows:

SAAO Tier 1	$25,000
SAAO Tier 2	$20,000
Faculty (T/TT or NTT)	$15,000
Non-Faculty EHRA	$10,000

- The college practice will be to pay allowances to new **T/TT faculty only**. The norm for the college is **$3,000** (covered by the Dean for T/TT hires, excluding spousal hires). Departments may pay up to $5,000, but must cover the additional cost. Payments beyond $5,000 require pre-approval from the Dean. Exceptions beyond the maximum amounts also require pre-approval from the Provost.
- Payments can be made as one flat-rate payment or through installments. Our college practice will be to pay **one flat amount**. Payment for Fall hires will be processed no earlier than June and for Spring hires no earlier than November.
- Receipts are only required when approved to go above the maximum amounts. If granted an exception to go above the maximum amount, payment will be limited to the actual amount of relocation expenses incurred, up to the designated exception amount, supported by receipts.
- Employees that separate from University employment prior to one year of completed employment may be required to reimburse the University at the gross amount of any allowance received. It will be the responsibility of the hiring department to collect any required reimbursement of relocation expenses from the employee. Our college practice will be to **not** collect reimbursement of relocation expenses from separating faculty.
- To get a fuller understanding of the process, please review the following:
    - POL 05.15.03, Non-Salary and Deferred Compensation Policy
    - University Controller's Office Relocation Allowance Guidelines
    - University Controller's Office Non-Salary Compensation
    - Human Resources Non-Salary and Deferred Compensation

The steps in our college process are as follows:

1. We will include the approved language regarding the relocation allowance in offer letters to new T/TT faculty with the following deviation:
    a. The default language that we will use in regards to receipts is "**will not be required**" since receipts are only required when approved to go above the maximum amounts.
    b. Please note that if requesting to pay above the maximum amount, the Non-Salary and Deferred Compensation form must be submitted and approved by the Dean and Provost prior to making an offer. If approved, the offer language should indicate that receipts "will be required."

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   c. We will **not** include the statement about reimbursement if the employee leaves within one year since our practice will be not to collect.

2. Upon receiving formal acceptance of an offer letter that includes a relocation allowance, the department should complete the **Relocation Allowance section** of the Non-Salary and Deferred Compensation Form.
   a. List the HR Specialist as the College Contact and provide their phone # and email.
   b. The employee ID will only be available if the hire as progressed to the point of an endorsed background check. If not, leave blank.
   c. Leave the project ID blank to be completed by Assistant Dean (explained below).
   d. The flat amount on the form must match the offer letter. Do not request installments.
   e. The Begin Date for Fall hires should be no earlier than June and for Spring hires no earlier than November. Each department will determine the begin date based on level of comfort with paying prior to arrival. These payments will not be processed via the HR system but rather through the Financial system as vouchers. As with all vouchers, they generally pay within 30 days of initiation.
   f. No end date is needed since our practice is not to pay in installments.
   g. The form (signed by the Head) should be submitted to the HR Specialist (HRS) via CPAWS along with the accepted offer letter.
   h. Payments will be processed via the Financial System as non-salary compensation directly to the accepted employee. Payments should **not** be paid on behalf of the employee to a vendor, with a P-card, via Marketplace, or a Purchase Order. The department Business Services Coordinator (BSC) must add the individual to the Supplier Center. Questions regarding how to accomplish this should be directed by the BSC to the Financial Services Team.
3. The HRS will obtain Dean's approval of the form, and then submit the form for university HR approval via the email address provided on the form.
4. Upon receiving HR approval, the HRS will submit the form to the Assistant Dean to complete the Project ID. Any amounts beyond $3,000 for new T/TT hires will automatically be charged to the department's enhancement funds.
5. The fully approved form will be handed off to college Financial Services to be paid via Accounts Payable. Vouchers will be processed on the Begin Date on the form provided all required information was provided and the individual is in the system as an approved "Supplier." Allowances must be paid directly to the employee on non-state funds using account code 51530 and category ID NA25.

Note:

Any exceptions to this policy will require Dean's approval in advance.