

Academic Removal Expense Exceptions

The payment of removal expenses (moving expenses) can be approved by the Associate Dean for Research as an exception for academic employees not covered under APM 560. The reimbursement of moving expenses is at the sole discretion of the PI/department and the availability of funds. Normally, an academic appointee can be reimbursed for up to 50% of their removal expenses but a PI can ask the Associate Dean for an exception to pay more than 50%. The Academic Removal Expense Exception Form must be used to request an exception for the Postdoc, Specialist and Project Scientist series. The form should also be used to request an exception for a payment of more than half the cost of the removal expenses.

Pre-offer letters should not include the payment of moving expenses until the Academic Removal Expense Exception form has been approved.

Moving expenses eligible for payment are defined as the reasonable costs incurred by a new appointee, or by a current employee who transfers to a new University location, of moving household goods and personal effects to a new residence. Such expenses also include the cost of travel to the University location for the individual and the members of his/her household.

Reasonable costs include those costs or expenses that are reasonable under the circumstances of a particular move, i.e., a move from the old to the new residence must be made via a conventional method of transportation using the shortest and most direct route available and in the shortest period of time normally required to travel such a distance.

The Academic Removal Expense Exception Form must be used to request an exception. The guidelines for paying removal expenses are detailed in the Business and Finance Bulletin, G:13: Policy on Governing Moving and Relocation. The complete guidelines can be found at the following link: <http://policy.ucop.edu/doc/3420347/BFB-G-13>

Actual and necessary moving expenses eligible for reimbursement, include the following:

- The cost of packing, crating, transporting, unpacking, and uncrating the appointee's household goods and personal effects. Such costs are limited to one household move per appointee.
- Actual and reasonable expenses related to insurance for the household goods while in transit, if incurred within any 30-day period after removal of the household goods and effects from the former primary residence.
- Actual and reasonable storage costs for household goods and personal effects for up to 30 days immediately after removal from the primary residence.
- Actual and reasonable expenses related to moving two personal motor vehicles per household (which may include motorcycles but excludes motorized recreational vehicles,

including boats, kayaks, canoes, airplanes, camping vehicles, snow machines, and jet skis). The vehicles may be shipped or driven. If the appointee decides to drive his or her personal vehicle, the appointee will be reimbursed at the mileage rate published in BFB [G-28](#), [Appendix A](#).

- Actual travel expenses for the individual and his or her immediate family, but not to exceed the cost of air coach transportation. If the appointee claims meal costs en route, those costs must be reimbursed in accordance with BFB [G-28](#).
- The cost of furnished temporary lodging for up to 30 days and meals for up to 30 days of residence in the temporary lodging if it does not have cooking facilities. Such reimbursements will be made in accordance with BFB [G-28](#).

Please note that there are some tax implications in receiving reimbursement for moving expenses.

Academic Removal Expense Exception Process

Step	Owner	Process
1	PI/RSO	<ul style="list-style-type: none"> • Determines an Academic employee not covered by APM 560 should receive reimbursement for moving expenses and contacts HR Generalist at ersohrops@erso.berkeley.edu
2	HR Generalist	<ul style="list-style-type: none"> • Sends Academic Removal Expense Exception Form to PI/RSO for signature • Receives signed exception form and submits it to ERSO Academic HR Assistant (197 M Cory Hall)
3	ERSO Academic HR Assistant	<ul style="list-style-type: none"> • Reviews form and submits it to ERSO Academic HR Analyst
4	ERSO Academic HR Analyst	<ul style="list-style-type: none"> • Gives final review and obtains Associate Dean's Signature • Gives a copy of the form back to HR Generalist
5	HR Generalist	<ul style="list-style-type: none"> • Sends approval to RSO and academic appointee
5	Academic Appointee	<ul style="list-style-type: none"> • Submits reimbursement request, uploading approved exception form to intranet along with other necessary documentation