

# Moving Expenses and Relocation Coverage

## FAQs for New Academic Staff

Relocation Services provides assistance with the movement of your household possessions and personal effects, house hunting trip and terminal move. Movement of office/lab equipment is not covered.

Allowable travel and relocation expenses are set out in the [Policy](#). Any additional coverage for relocation costs negotiated with the hiring unit should be outlined in the supplemental conditions of your contract letter.

\*\*Moves which are being deferred beyond one year from appointment start date will need prior approval from Relocation Services.\*\*

### **Who is eligible for the moving expenses and relocation coverage?**

Academic staff members hired on continuing appointments whose employment is governed by one of the four Board-AASUA Agreements (Faculty, Administrative and Professional Officers, Librarians, and Faculty Service Officers) may be provided with travel and household relocation assistance through the Relocation Fund. Movement of office/lab equipment is not covered under this procedure.

### **Do I arrange my own move?**

No, upon receiving notice that you have been hired by the hiring unit, the University's Relocation Coordinator will contact you to initiate your move. The University has two designated van lines: Armstrong International Movers Ltd. and AMJ Campbell.

The University's Relocation Coordinator will contact both van lines and request that representatives contact you to arrange a convenient time to complete an estimate of the weight and cost to transport your household possessions and personal effects. At the time of the estimate, it is important that you indicate any unusual or valued belongings that may require special handling.

Once the estimates have been completed by the moving companies, they will be forwarded to the University's Relocation Coordinator. The Relocation Coordinator will advise you which company has been awarded the moving contract.

### **Do I have to pay the movers in advance and be reimbursed?**

The University will pay the van line directly for the costs associated with transporting your household possessions and personal effects up to your maximum weight allowance. Any amounts exceeding this allowance will be charged directly to you unless additional coverage has been negotiated with the Department/Faculty.

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*The majority of staff relocations occur during late spring and early summer, which is the busiest time for moving companies. It is important to arrange quotations early to allow time for the University to consider each quote before awarding the contract. Moving companies may not have the capacity to handle last minute requests.*

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### **Do I have to do my own packing?**

No, the moving company will pack, load, ship and unload all your household possessions and personal effects.

### **Can I arrange for special packing for some of my items?**

It is important to discuss any special packing requirements with the van line representative at the time the estimate is completed.

### **Will the University cover the cost of a secondary move?**

Payment of moving expenses pertaining to a secondary location is normally your responsibility unless you have negotiated additional relocation costs with the hiring unit/Faculty. If you are reimbursed for a secondary move, the University will need to charge a taxable benefit as per the Canada Revenue Agency regulations.

### **If I need to store my household items is the cost covered?**

If you need to store your household items, the Relocation Fund will cover the first 30 days. You will be responsible for covering the cost for any additional days.

### **What do I do if some of my household goods are damaged in the move?**

In the event of damage or loss of goods you are required to contact the moving company within 30 days to file a claim.

### How do I claim the University's non-accountable moving allowance?

It is up to you to decide which incidental expenses are going to be covered under this allowance (e.g. work permit, car rental, meals, taxis, relocation of pets, etc.). The non-accountable moving allowance will be paid as a non-taxable payment as part of your regular pay. You will receive up to \$500 if moving from within Canada and up to \$650 if moving from outside Canada. Once you arrive on campus to take up your employment, download and complete the *Non-Accountable Moving Allowance for Incidental Relocation or Moving Expenses* form —

[http://www.hrs.ualberta.ca/hiringandmanaging/Recruitment/~/\\_media/hrs/hiringmanaging/relocation/MovingAllowanceForm.doc](http://www.hrs.ualberta.ca/hiringandmanaging/Recruitment/~/_media/hrs/hiringmanaging/relocation/MovingAllowanceForm.doc) and forward it to the Relocation Coordinator, Relocation Services, 2-60 University Terrace.

### Do I have to keep my receipts for the non-accountable moving allowance?

Yes. The University does not require receipts for this allowance; however, we suggest that you keep all receipts in case you are audited by the Canada Revenue Agency.

### Can I bring my spouse and child on the house-hunting trip?

The University covers air travel and accommodations for up to two immediate family members (i.e. staff member, spouse/partner, or a dependent child). The person accompanying the staff member must be resident with the staff member and making the move with him/her. If you, your spouse and child are coming for a house-hunting trip, we will cover the cost of two people (e.g. you and your spouse) and you would be responsible for covering the expenses for your child.

### For my house-hunting trip, do I book my own travel/hotel arrangements?

There are two options available when planning your house-hunting trip.

**Option 1:** contact the hiring unit to have your air travel and hotel accommodations arranged through a travel and/or hotel authorization payment. This results in fewer out-of-pocket expenses.

**Option 2:** arrange your own air travel and accommodations and have the University reimburse you upon submission of original receipts by completing an *Expense Report* online. **PLEASE NOTE: for your house-hunting trip, only airfare and hotel can be reimbursed on your expense report.** Taxi fare, meals, parking at the airport, etc. are expenses that are claimed through the non-accountable moving allowance.

Visit <https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions>

The screenshot shows a web browser window displaying the University of Alberta Information Services and Technology website. The URL in the address bar is <https://ist.ualberta.ca/enterprise-app>. The page features a navigation menu with the following items: Home, CCID, Collaboration, Academic, Technical, Enterprise (selected), and Contact Us. Below the navigation menu, there is a breadcrumb trail: Home > Enterprise > Enterprise Applications. The main heading is "Enterprise Applications". Below this heading, there is a paragraph of text describing the Enterprise Applications, as part of Information Services and Technology (IST) Enterprise Solutions offerings, manage the central University-wide administrative systems. They consist primarily of: Bear Tracks (Student and Employee Self-Service), Peoplesoft (Campus Solutions, Financials and Human Capital Management), and Research Ethics Management Online (REMO) suite of products. For these applications, IBM Global Services provides infrastructure management (servers, network and databases) support services, Tata Consultancy Services (TCS) provides application management support services and Information Services and Technology (IST) provides first level Help Desk services. IST is also responsible for coordinating and monitoring the efforts of the service providers, new development vendors, the central services owners and general campus users. Below the text, there is a section titled "Sign On Links" with five buttons: Bear Tracks, Campus Solutions, Financials, HCM, and REMO. An arrow points to the "Financials" button.

Click on Financials

Login using your CCID and Password

### Campus Computing ID Login

**The resource you requested requires you to authenticate.**

CCID:

Password:

**Self-Service Center**

<p><b>General Inquiry</b> Inquire on general self-service activities.</p> <ul style="list-style-type: none"><li><a href="#">SpeedCode Inquiry*</a></li><li><a href="#">PER Balance Inquiry*</a></li></ul>	<p><b>Travel and Expenses</b> Create an expense reimbursement, travel or PER claim.</p> <ul style="list-style-type: none"><li><a href="#">Create Expense Report</a></li><li><a href="#">Modify Expense Report</a></li><li><a href="#">View Expense Report</a></li><li><a href="#">Travel and Expense Center</a></li></ul>	<p><b>Manage Approvals</b> Approve transactions for processing.</p> <ul style="list-style-type: none"><li><a href="#">Approve T&amp;E Transactions</a></li></ul>
<p><b>Procurement</b> Create requisitions and view procurement activity and status.</p>	<p><b>Training Resources</b> Access learning resources.</p> <ul style="list-style-type: none"><li><a href="#">Financials Online Training</a></li><li><a href="#">Quick References*</a></li></ul>	<p><b>External Links</b> Access other key resources.</p> <ul style="list-style-type: none"><li><a href="#">UAPPOL*</a></li><li><a href="#">Research Ethics (REMO)*</a></li></ul>

Click **Create Expense Report**

Template Information			
	Template	Description	Template Type
<input type="button" value="Select"/>	EXPENSES	Non-Travel Expenses	Public Template
<input type="button" value="Select"/>	TRAVEL	Travel Expenses	Public Template

Select the appropriate template (**Travel**)

**Add Expense Types:**

	Select	Expense Type
	<input checked="" type="checkbox"/>	Accommodations
	<input type="checkbox"/>	Airfare

Select the applicable **Expense Type** – click **OK** at the bottom

1. General Information section

2. Accounting Defaults link

3. Save button

4. Expense table with columns: Expense Date, Amount Spent, Currency, GST

5. Submit button

6. Print Detailed Report link

7. Another button

(The numbers below correspond to the number above)

1. Complete the **General Information** as follows (**Description:** Relocation, **Business Purpose:** Relocation, **Details:** example - Househunting – June 11 – 14, 2012)
2. Click the **Accounting Defaults** link

3. Accounting Summary table

Speedcode	Description	%	*GL Unit	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity	Source Type	Cat
81311	Relocation Expenses	100.00	UOFAE	100	720325	81174	0					

3. Enter 81311 for Relocation **Speed Code**, press **TAB** – Click **OK**
4. \*Note **Expense Date** (change if applicable)  
 \*Indicate **Amount Spent**  
 \*Note **Currency**- please leave at CAD – Canadian, if required, use [this web site](#) for the *Currency Converter* and enter only Canadian currency on your expense report (in section 2 of the *Currency Converter*, enter all zero's for *foreign exchange charges*)  
 \***GST** – please ensure if CAD – Canadian, that you do not check "no GST" so it will automatically calculate the GST for you (if receipts have HST, then GST will be equal to the HST X 5%)  
 \*Enter **Description** (name of hotel , # of nights and \$ per night - **Please note**, it is important to include this information)
5. Click **Save** (the system automatically generates a report ID)
6. Click the link **Print Detailed Report**
7. Click **Submit**
8. Make a copy of the claim form and receipts for your files
9. Attach original receipts and submit the claim form to: Relocation Services, 2-60, University Terrace

10. Relocation Services will verify all items on the expense report. The approver of the electronic submission may “send back” your claim and Relocation Services will provide additional supporting details for you to modify your claim. To modify your claim you need to choose Modify if your claim has been sent back to you and you need to know the report ID

*Important: After you modify, Save/Print Detailed Report/Submit again*

11. If modifications are not required, Relocation Services will submit the claim with original receipts to HR Finance for completion of your claim.

Note – the reimbursement will be automatically direct deposited and will appear in approximately 1-2 weeks.

You will require a Campus Computing ID (CCID) to complete an Expense Report and you obtain your CCID from your Department/Faculty contact. Reimbursement can't be completed until your appointment has begun.

- For expenses **solely covered by the Relocation Fund**, the original Expense Report and original receipts are sent to the Relocation Coordinator for processing. If expenses are **jointly covered by the Relocation Fund and the Department/Faculty**, separate entry lines are entered on the expense report and for those items not covered by the Relocation Fund, the Department speed code is used. With the on-line procedure, the Expense Report will electronically route to the Department for approval and Human Resources for approval. The original Expense Report and original receipts are sent to the Relocation Coordinator for processing.

**If the expenses are covered by the Department/Faculty, the hiring unit processes the claim and keeps the original receipts on file.**

#### **Can I claim a per diem?**

Any per diem would need to be claimed as part of your non-accountable moving allowance (\$500 moving from within Canada; \$650 moving from outside Canada).

#### **Are my immigration fees covered?**

Your work permit and temporary resident fees would need to be claimed as part of your non-accountable moving allowance (\$500 moving from within Canada; \$650 moving from outside Canada). Fees for application for permanent residents, study permits for your dependent children, and a work permit for your partner/spouse are not covered.

#### **Can I rent a vehicle for my house-hunting trip?**

These expenses (i.e. rental fee and gas) would need to be claimed as part of your non-accountable moving allowance (\$500 if moving from within Canada or \$650 if moving from outside Canada).

#### **For my terminal trip I wish to drive my personal vehicle. My family will fly out at a later date. What will be covered?**

The University will cover the cost of air travel, up to economy air fare by the most direct route for your spouse/partner and dependent children. If you choose to drive your personal vehicle to Edmonton by the most direct route, the University will reimburse fuel expenses and reasonable hotel accommodations up to two nights, upon submission of original receipts. If you choose to take extra travel time for personal reasons, you are responsible for covering the extra fuel costs and accommodations.

**Option 1:** contact the hiring unit to have your terminal airfare arranged through a travel authorization payment. This results in fewer out-of-pocket expenses.

**Option 2:** arrange your own travel and have the University reimburse you upon submission of original receipts by completing an *Expense Report* (please see above instructions).

**PLEASE NOTE: for your terminal trip, only airfare can be reimbursed on your expense report.** Taxi fare, meals, parking at the airport, etc. are expenses that are claimed through the non-accountable moving allowance.

You will require a Campus Computing ID (CCID) to complete an Expense Report and you obtain your CCID from your Department/Faculty contact. Please visit <http://www.hrs.ualberta.ca/HiringandManaging/Recruitment/Academic/Relocation.aspx> for an example on completing an Expense Report.

- For expenses that are **solely covered by the Relocation Fund**, the original Expense Report and original receipts are sent to the Relocation Coordinator for processing. If expenses are **jointly covered by the Relocation Fund and the Department/Faculty**, separate entry lines are entered on the expense report and for those items not covered by the Relocation Fund, the Department speed code is used. With the on-line procedure, the Expense Report will stop at the Department level for approval and Human Resources for approval. The original Expense Report and original receipts are sent to the Relocation Coordinator for processing.

**If the expenses are covered by the Department/Faculty, the hiring unit processes the claim and keeps the original receipts on file.**

**Will the University cover the cost of transporting my household pets?**

These expenses would need to be claimed as part of your non-accountable moving allowance (\$500 if moving from within Canada or \$650 if moving from outside Canada).

**Does the University require original receipts for reimbursement?**

Yes, it is extremely important that you keep the detailed original receipts as it is an audit requirement for reimbursement. An original VISA or MasterCard chit is not considered the original receipt. For air travel you must provide boarding passes and an airline receipt that indicates the cost and payment of the flights.

**Do I need to clear customs for my household goods?**

When your personal goods arrive from the US or overseas, prior to the van line delivering your items to your new residence, you will need to clear customs. When the truck or shipping container arrives in Edmonton, you will be contacted by the van line and given 24-hours' notice to clear customs, in person, at the Edmonton International Airport. Your goods will be held in bonded storage until customs releases them. Any bonded storage charges that are incurred due to your unavailability to clear customs when your goods arrive will be charged to you. Note: You must have a valid work permit in hand before your goods can be released.

**Can I relocate my office/lab equipment?**

The University's Relocation Fund does not cover the movement of office and/or lab equipment. If the hiring unit has agreed to cover this expense then they may authorize to have your office/lab equipment shipped to the University of Alberta and those "commercial" goods are cleared through customs by the University's customs broker. Personal goods are imported differently, and you should report to Canada Customs in person to declare "personal effects." Goods for business and personal goods should not be combined into one shipment. If the two types of goods are combined, the entire shipment will be treated as "business" related and you may be required to pay duty and taxes on otherwise exempt goods.

**Can I claim moving expenses on my income tax?**

Income Tax Regulations may allow you to deduct some moving expenses (that were not reimbursed by the University) from your employment income. However, in most cases your move must be from one place in Canada to another place in Canada. Further information can be found at the Canada Revenue Agency (<http://www.cra-arc.gc.ca/tx/ndvdl/lf-vnts/mvng/menu-eng.html?slnk>).

**Can you recommend a real estate agent?**

No, the University does not have preferred providers for real estate.

Resources:

Canada Mortgage and Housing Corporation –  
<http://www.cmhc.ca/en/co/buho/hostst/index.cfm>

Edmonton Yellow Pages (search by realtors) – <http://www.yellowpages.ca/>

**Who can I contact if I have further questions?**

The University's Relocation Coordinator can be reached at 780-492-4605 or at [hreloca@ualberta.ca](mailto:hreloca@ualberta.ca).