

Options for New Employee Relocation

This chart outlines the three procedures available for payment of new employee moving expenses.

For all new employee moves, department should designate a department member to act as a liaison between the new employee and central offices.

REIMBURSEMENT TO NEW EMPLOYEE (Most Common)	UO PAYS MOVING COMPANY DIRECTLY FOR NEW EMPLOYEE'S MOVE	TRAVEL ADVANCE TO NEW EMPLOYEE (Least Common)
<u>SUMMARY/OVERVIEW</u>	<u>SUMMARY/OVERVIEW</u>	<u>SUMMARY/OVERVIEW</u>
<p>As part of the hiring process, the department provides an allocated amount of money for new employee to relocate for new position at UO.</p> <p>The new employee is entirely responsible for how household goods are moved from origin to destination.</p>	<p>As part of the hiring process, the department provides an allocated amount of money for new employee to relocate for new position at UO.</p> <p>UO enters into a Purchase Order (PO) directly with moving company for a not-to-exceed amount. If PO will exceed \$25,000, department and new employee must work with PCS to complete the appropriate competitive process.</p> <p>UO receives the invoice for moving services and pays the moving company, up to the maximum not-to-exceed amount provided on the PO.</p> <p>If there are unauthorized or additional charges in excess of the not-to-exceed amount on the PO, employee is responsible for those charges.</p> <p>Contractual agreement governing all moving services is executed by new employee with moving company, (this agreement is not the PO).</p>	<p>Not a preferred method, but is available if the first two options are not possible.</p> <p>As part of the hiring process, the department provides an allocated amount of money for new employee to relocate for new position at UO.</p> <p>Used when new employee is conducting a "self-move", purchasing materials or renting moving equipment (example: U-Haul®).</p> <p>UO provides employee with cash advance of part of the moving allowance to cover moving expenses.</p> <p>Recommend that advance amount not exceed 50% of the moving allowance.</p>
<u>MOVING CONTRACT OPTIONS</u>	<u>MOVING CONTRACT OPTIONS</u>	<u>MOVING CONTRACT OPTIONS</u>
<p>UO Price Agreements with discounts are available for use by new employee: see UO price agreements.</p> <p>Binding quotes for moving services are strongly recommended, but are not required.</p> <p>New employee may wish to obtain quotes from more than one moving company.</p>	<p>UO Price Agreements with discounts are available for use by new employee: see UO price agreements.</p> <p>Binding quotes for moving services are strongly recommended, but are not required.</p> <p>New employee may wish to obtain quotes from more than one moving company. If over \$25,000, must complete appropriate competitive process.</p>	<p>UO Price Agreements with discounts are available for use by new employee: see UO price agreements.</p> <p>Binding quotes for moving expenses are strongly recommended, but are not required.</p> <p>New employee may wish to obtain quotes from more than one moving company.</p>

REIMBURSEMENT TO NEW EMPLOYEE (Most Common)	UO PAYS MOVING COMPANY DIRECTLY FOR NEW EMPLOYEE'S MOVE	TRAVEL ADVANCE TO NEW EMPLOYEE (Least Common)
<p style="text-align: center;"><u>REQUIREMENTS</u></p> <p>New employee enters into contract with moving company directly for all moving services.</p> <ul style="list-style-type: none"> • Advise employee of limits on Moving Expenses (see one page summary attached) or go to Moving/Relocation Expenses • Advise employee of three important documents moving company will ask employee to sign: <ul style="list-style-type: none"> ○ Bill of Lading, ○ Accessorial Sheet, and ○ Inventory Sheets. <p>Employee signs contract and provides payment to moving company.</p> <p>Employee must submit original moving expense receipts for reimbursement to its UO department.</p>	<p style="text-align: center;"><u>REQUIREMENTS</u></p> <p>UO enters into a PO with moving company for a not to exceed amount.</p> <ul style="list-style-type: none"> • If PO will exceed \$25,000, department and new employee must complete the appropriate competitive process. <p>Except for the PO (which only commits UO to pay for a specified amount of the moving services), new employee enters into contract with moving company directly for all moving services.</p> <ul style="list-style-type: none"> • Advise employee of limits on Moving Expenses (see one page summary attached) or go to Moving/Relocation Expenses • Advise employee of three important documents moving company will ask employee to sign: <ul style="list-style-type: none"> ○ Bill of Lading, ○ Accessorial Sheet, and ○ Inventory Sheets. <p>UO PCS approves/signs the PO. UO pays moving company up to the not-to-exceed amount listed on PO.</p> <p>Employee signs all other contract documents and provides any payment to moving company for any additional charges in excess of not-to-exceed amount on PO.</p>	<p style="text-align: center;"><u>REQUIREMENTS</u></p> <p>New employee must complete BAO travel advance forms and enter into Promissory Note for the amount of the advance.</p> <p>New employee enters into contract directly with moving company/contractors.</p> <ul style="list-style-type: none"> • Advise employee of limits on Moving Expenses (see one page summary attached) or go to Moving/Relocation Expenses • If using a moving company, advise employee of three important documents moving company will ask employee to sign: <ul style="list-style-type: none"> ○ Bill of Lading, ○ Accessorial Sheet, and ○ Inventory Sheets. <p>Employee signs contract and provides payment to moving company.</p> <p>Employee must submit original moving expense receipts to UO department for verification of moving expenses to offset the amounts advanced by UO to employee.</p> <p>If amount of money advanced exceeds the costs of moving expenses, new employee must repay the excess amount advanced.</p>