



## Relocation Expense Policy for New Faculty & Staff

### Option 1: Self-Move or PODS/U-Box

Chapman University will provide reimbursement for qualified moving expenses up to your approved moving allowance as indicated in your offer letter of employment.

### Option 2: Contracted Full Service Moving Vendors

Chapman University has negotiated multiple-transportation rates with selected vendors listed below. The rates provide substantial discounts for moving, replacement valuation and/or storage costs. Please be aware that while we have negotiated these discounts for your convenience, we want to remind you that you are free to choose any service provider that best meets your needs. Chapman is not responsible for any damage to your items or any issues that may arise with the selected vendors. All resolution and negotiations regarding such matters must be handled directly with the vendor. If you have irreplaceable or difficult to relocate items such as antiques, pianos, or priceless heirlooms we highly recommend looking into specialty movers or self-move for those items to ensure your satisfaction.

Moving Companies	Contacts	Telephone #s	E-Mail Addresses
United Van Lines / Chipman Relocations	Shaina Perreira	(714) 487-5601	<a href="mailto:sperreira@chipmanrelo.com">sperreira@chipmanrelo.com</a>
North American Van Lines / Alex Moving & Storage	Maribel Mendoza	(800) 231-4765 Ext. 103	<a href="mailto:mmendoza@alexmoving.net">mmendoza@alexmoving.net</a>
Pure Moving Company (within CA only)	Sales	(800) 816-5121	<a href="mailto:info@puremovers.com">info@puremovers.com</a>

The following procedures will apply to any faculty/staff member who chooses to hire their own full service moving vendor:

- You must obtain and submit two (2) vendor estimates to [purchasing@chapman.edu](mailto:purchasing@chapman.edu) for review.
- You may choose any vendor, however, Chapman University will only reimburse for the lowest bid amount up to your approved moving allowance (unless cost justification was approved). You are responsible for covering the difference.
- To receive reimbursement, you must submit the vendor's formal invoice/receipt in addition to the estimates.

**Note: Vendor selection based on subjective rationale or preferences will not be sanctioned by Chapman University.**

## Relocation FAQs

- **Can Chapman pay relocation expenses directly on my behalf?** Chapman can pay vendors directly if they accept purchase orders. Otherwise, you will be reimbursed for your out-of-pocket expenses.
- **How long does reimbursement take?** Reimbursement can occur as early as your first paycheck. As long as payroll has received your [Relocation Expense Reimbursement Form](#) with all receipts by the 10<sup>th</sup> of the month, it will be included on that month's paycheck of the 26<sup>th</sup>.
- **What expenses will Chapman reimburse me for?** Chapman reimburses expenses [IRS Publication 521](#) defines as "deductible" moving expenses plus meal per diem when overnight travel is required and limited house hunting expenses, if approved by your department. Total reimbursement will not exceed the moving allowance indicated in your contract. The most common reimbursable expenses are as follows:
  - Cost of moving your household goods, personal effects, car, and pets. This includes the cost of boxes, bubble wrap, etc., packing, crating, truck rental, PODS, in-transit storage, and insurance.
  - Storage and insurance of your household goods and personal effects for up to thirty consecutive days after they are moved from your former home and before they are delivered to your new home.
  - Travel by car/rental truck (mileage reimbursement OR actual costs of gas & oil) using a direct route. Short deviations to rest stops, service stations, and hotels are acceptable.
  - Travel by air: One way coach tickets for yourself and household members including luggage fees.
  - Hotel stay if required by overnight travel, including hotel stay the night you arrive at standard occupancy rates.
  - Chapman will also reimburse you for meals at the [per diem rate](#) when overnight travel is required. (Federal & CA State taxable).
  - At your department's discretion they may approve reimbursement for travel, hotel, and meals before your relocation for one house hunting trip. (Federal and CA State taxable)
- **What qualifies as an acceptable receipt?** For business purposes, a receipt is a detailed record provided by the merchant after a transaction has been completed. It must include the name of the seller/business, date of the transaction, amount, a detailed list of the item(s) purchased, form of payment. Order forms, reservations, confirmations, and copies of a credit card statement are not acceptable receipts.
- **Is it okay if a receipt has my spouse's name on it?** Yes, if it represents unreimbursed relocation expense for your household. Please identify the relationship to the individual shown on the receipt in the comments section of the reimbursement form.
- **If I plan to rent a truck or use PODS, do I need to provide two estimates?** No. Two estimates are only required if you wish to hire a full-service moving vendor other than our selected vendors.
- **Why were taxes withheld from my reimbursement check?** The 2017 Tax Cuts and Jobs Act requires employer paid/reimbursed relocation expenses for employees to be recorded as federal taxable wages. Chapman must collect your share of the employment taxes as well as pay the employer's share of taxes. All taxable wages and taxes withheld related to relocation will be included in your W-2.
- **Is it okay if I move first and move the rest of my household members/goods later?** Yes, all expense reimbursement requests should be submitted by May 10<sup>th</sup> of the academic year you were hired in. However, please note that Chapman does not reimburse travel expenses incurred by you to return to your previous address to make those arrangements later.
- **Who do I contact if I still have questions about eligible expenses or to get a status update on my reimbursement?** Vi Pham [vpham1@chapman.edu](mailto:vpham1@chapman.edu)