Moving and Relocation Expenses Procedure
For New Academic and Excluded Staff

Relocation Procedure

The University may assist with the arrangements and expenses connected with the relocation of new academic and excluded staff members to take up employment at the University of Alberta. Expenses incurred may be paid directly by the University or reimbursed to the staff member on a non-taxable basis.

Staff members will be provided a weight allowance for removal of household items from their current primary residence, which includes packing, loading, shipping, unloading and 30 days storage based on the number of family members being relocated and the most economical method.

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 movers: Armstrong Moving and AMJ Campbell. The University’s Relocation Coordinator will contact both movers 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.

If a private automobile is being shipped, the cost may be covered under the maximum weight allowance.

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. The successful moving company will then contact you directly to secure your moving date and answer any questions that you may have.

The University will pay the moving company 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.

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.

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.

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

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.). Fees for application for permanent residents, study permits for your dependent children, and a work permit for your partner/spouse are not covered. 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, complete the Non-Accountable Moving Allowance form and submit it to your hiring unit for processing. The reimbursement will be processed with your pay.

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.

The Canada Revenue Agency’s website – [http://www.cra-arc.gc.ca/taxe/bsnss/tpcs/pyrll/bnfts/prvdd/mvng/nt-eng.html](http://www.cra-arc.gc.ca/taxe/bsnss/tpcs/pyrll/bnfts/prvdd/mvng/nt-eng.html) has a list of moving expenses that can be paid or reimbursed as a non-taxable benefit.

**Letter of Undertaking and Reversal Contract**

If your move is outside of Canada, a Letter of Understanding and Reversal Contract need to be completed. The Letter of Undertaking states that the U of A will pay duties and taxes in the event that the goods do not comply with Canada Customs’ laws. The Reversal Contract is a way to get that cost back from the new hire if the situation arose. Your hiring unit will provide you with the Letter of Undertaking and ask you to return a signed copy of the Reversal Contract to them prior to your move.

**House-hunting and Terminal Trips**

For the house-hunting trip, the University covers air travel, up to economy airfare by the most direct route, and reasonable accommodations up to a maximum of four nights 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 them. If you, your spouse and child are coming for a house-hunting trip, the U of A 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 the terminal trip, the University will cover the cost of air travel, up to economy airfare, 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 (no mileage) 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.

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.

In regards to booking your house-hunting and terminal trips, there are two options available:

**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 your hiring unit reimburse you upon submission of original receipts by completing an Expense Report online once your appointment has begun. Taxi fare, meals, parking at the airport, etc. are expenses that are claimed through the non-accountable moving allowance.

To submit an expense report go to: [https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions](https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions)
Click on Financials

Login using your CCID and Password

Click **Create Expense Report**

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
<th>Template Type</th>
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<tbody>
<tr>
<td>EXPENSES</td>
<td>Non-Travel Expenses</td>
<td>Public Template</td>
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<tr>
<td>TRAVEL</td>
<td>Travel Expenses</td>
<td>Public Template</td>
</tr>
</tbody>
</table>
Select the appropriate template (Travel)

Add Expense Types:

Select | Expense Type
-------|----------------
✓ | Accommodations
☐ | Airfare

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

(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. Enter **your hiring unit’s 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 your hiring unit.

10. Your hiring unit will verify all items on the expense report. The approver of the electronic submission may “send back” your claim and your hiring unit 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, your hiring unit will submit the claim with original receipts to their Finance group 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.

**Clearing Customs**

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.

If the hiring unit has agreed to cover the expense of relocating your office/lab equipment then they may authorize to have that 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.

**Claiming Moving Expenses on Your 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/ndvds/lf-vmnts/mvng/menu-eng.html?=sink](http://www.cra-arc.gc.ca/tx/ndvds/lf-vmnts/mvng/menu-eng.html?=sink)).

**Questions**

The University’s Relocation Coordinator can be reached at 780-492-4605 or at hrreloca@ualberta.ca.