

Moving Expenses and Relocation Coverage

Academic Staff

Department/Faculty Contacts

New continuing academic staff whose employment is governed by one of the four Board-AASUA Agreements (Faculty, APO, Librarian, and FSO) may be provided with travel and household relocation assistance through the Relocation Fund. Movement of office/lab equipment is not covered under this procedure.

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

Frequently Asked Questions

Who notifies the University's Relocation Coordinator of a new hire?

Once the new hire has signed the appointment contract letter and supplementary conditions, the hiring unit downloads and completes a *Request for Relocation Services* form and sends it to Relocation Services, along with a copy of the signed appointment contract and supplementary conditions. Email to hreloca@ualberta.ca. Please visit the Relocation web site for the Request for Relocation Services form.

http://www.hrs.ualberta.ca/HiringandManaging/Recruitment/~media/hrs/forms/hiringmanaging/request-relocation_services.doc

Any additional relocation assistance negotiated with the hiring unit over and above the University's moving expenses and relocation benefits must be indicated on the Request for Relocation Services form.

How do we arrange the movement of office/lab equipment?

Goods for business and personal goods should not be combined into one shipment. The hiring unit/Faculty is responsible for the cost of relocating an office and/or lab equipment directly 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 the new hire must report to Canada Customs in person to declare "personal effects." If the two types of goods are combined, the entire shipment will be treated as "business" related and the University may be required to pay duty and taxes on otherwise exempt goods.

Will the Relocation Fund cover the cost of a secondary move?

No, moving expenses pertaining to a secondary location are not covered by the Relocation Fund. If the hiring unit is reimbursing for a secondary move, the University must charge a taxable benefit as per Canada Revenue Agency regulations. The expense would need to be approved by the Provost or Vice-President (Finance & Administration). If approved, the hiring unit must download and complete a Taxable Benefit form located in the HRS [forms cabinet](#) under Payroll Forms.

How does the University determine which expenses are considered non-taxable?

The Canada Revenue Agency's website – <http://www.cra-arc.gc.ca/tx/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 to the new hire. Any expenses not listed are generally considered a taxable benefit to the new hire.

What is the University's non-accountable moving allowance?

This is a non-taxable payment for up to \$500 if the new hire is moving from within Canada and up to \$650 if moving from outside of Canada. The new hire downloads and completes 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> and forwards it to the Relocation Coordinator, 2-60 University Terrace. The University doesn't require receipts for this allowance; however, we suggest that the new hire keep all receipts in case they are audited by Canada Revenue Agency.

Who is covered under the house-hunting trip?

The University will cover the cost of air travel, up to economy air fare by the most direct route, reasonable hotel accommodation up to a maximum of four nights for two immediate family members (i.e. staff member, spouse/partner, or a dependent child). The family member must reside with the staff member and be completing the move with them. If the new hire, spouse and child are coming for a house-hunting trip, the University will cover the cost of two people (e.g. new hire and spouse). The new hire would be responsible for covering the expenses for the child. Meals, car rental, taxi, parking, etc. would be covered as part of the non-accountable moving allowance.

Can a TAP or HAP be used to arrange air travel and hotel bookings?

Yes, the University strongly encourages hiring units to arrange the air travel and/or hotel booking using a TAP form — www.tap.ualberta.ca/ and/or HAP form — www.hap.ualberta.ca/. This results in fewer out-of-pocket expenses for the new hire.

- When using a HAP and/or TAP form, the hiring unit must always provide the speed code on the original form(s). Please contact the Relocation Coordinator for the speed code. The original form(s) must be sent to the Relocation Coordinator (not Supply Management Services) for financial authorization.
- If expenses are **solely covered by the Relocation Fund**, the original HAP and/or TAP form (TAP accompanied by a copy of the e-ticket) is sent to the Relocation Coordinator. The Relocation Coordinator will authorize the payment and send the HAP and/or TAP form to Human Resources Services (Finance Administration) who will ensure it is sent on to Supply Management Services.
- If the expenses are **jointly covered by the Relocation Fund and the Department/Faculty**, the additional entry line on the form(s) must be used for the portion not covered by the Relocation Fund and requires the Department speed code and Department financial authorization. Send the original HAP and/or TAP (TAP accompanied by a copy of the e-ticket) to the Relocation Coordinator. The Relocation Coordinator will authorize the payment and send a copy of the HAP and/or TAP form, to Human Resources Services (Finance Administration) who will ensure it is sent on to Supply Management Services.

How does a new hire claim out-of-pocket expenses?

The Staff member submits an Expense Report. The instructions are on the [Relocation website](#) (click the link *Instructions on Submitting 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 on the expense report are entered 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.

It is extremely important that the detailed original receipts are kept as it is an audit requirement for reimbursement. An original VISA or MasterCard chit is not considered the original receipt.

Will the Relocation Fund cover Immigration Fees?

The new hire's work permit and temporary resident fees for his/her family (if applicable) would need to be claimed as part of the new hire's non-accountable moving allowance (\$500 moving from within Canada; \$650 moving from outside of Canada). Study Permits for the new hire's dependent children and a Work Permit for his/her spouse plus permanent resident fees are **not** covered by the Relocation Fund. If the hiring unit is reimbursing for such fees, the expense would need to be approved by the Provost or Vice-President (Finance & Administration). If approved, the University must charge a taxable benefit as per Canada Revenue Agency regulations. The new hire must complete an Expense Report on-line and the hiring unit must download and complete a Taxable Benefit form located in the HRS [forms cabinet](#) under Payroll Forms.

Who can I contact if I have questions?

The Relocation Coordinator can be reached by calling 780-492-4605 or emailing hreloca@ualberta.ca or view the website at:

<http://www.hrs.ualberta.ca/HiringandManaging/Recruitment/Academic/Relocation.aspx>