

# Moving & Relocation Expenses Procedures

(Effective November 2015)

## **SECTION 1: FILING A MOVING AND RELOCATION EXPENSE FORM**

- 1.1. Moving and relocation expenses are considered for approval by submitting a properly completed *Moving and Relocation Expense Form to the Accounting Office (Accounts Payable section)*. The form must be signed by the faculty/staff member making the claim, and approved by the appropriate Vice-President or Dean (if AVC). The *Moving and Relocation Expense Form* is available online through the Accounting Office's website.
- 1.2. The following information shall be provided when completing a *Moving and Relocation Expense Form*:
  - 1.2.1. Faculty/staff person's name, department, position title, appointment date, employee number, email, phone number, and location the faculty/staff member is moving from.
  - 1.2.2. **Relocation Expense** information for Transportation Costs for Airfare **OR** Actual Travel Costs, and up to 3 days of Accommodations/Meals upon arrival in PEI:
    - 1.2.2.1. Line A - Airfare: Airfare information shall include the names for each faculty/staff member, spouse and dependant. The total Airfare costs shall be provided in Line A.

**OR**

- 1.2.2.2. Line B – Actual Travel Costs: Mileage and meal Costs are reimbursed on a Per Kilometer and Per Diem basis respectively. Mileage Costs shall be calculated by multiplying the number of kilometers travelled by the appropriate Per Kilometer rate. Meal Costs shall be calculated by multiplying the number of travelers by the number of days travelled, multiplied by the appropriate Per Diem rate.

The total Mileage cost, Meal Cost and Accommodation cost shall be provided in Line B.

A documented airfare quote shall be obtained to demonstrate that Actual Travel Costs do not exceed economy airfare via the most direct route.

- 1.2.2.3. Line C – Accommodation/Meals Upon Arrival (Up to 3 days): The location(s) of accommodations and costs of accommodations and meals shall be provided and totalled in Line C. Meal Costs shall be calculated by multiplying the number of travellers by the number of days claimed upon arrival, multiplied by the appropriate Per Diem rate.
- 1.2.2.4. Line D – Relocation Total: The lesser of Lines A or B, plus C shall be provided in Line D.

1.2.3. **Moving Expense** information:

- 1.2.3.1. Line E - Moving Expenses: Expenses for removal of household effects, selling costs of former residence, and costs of breaking residence lease agreement shall be provided and totaled in Line E.
- 1.2.3.2. Line F - Accommodation/Meals Upon Arrival (Up to 4 days): The location(s) of accommodations and costs of accommodations and meals shall be provided and totalled in Line F. Meal Costs shall be calculated by multiplying the number of travellers by the number of days claimed upon arrival, multiplied by the appropriate Per Diem rate.
- 1.2.3.3. House Hunting Trip: The costs of one house hunting trip shall be provided in Lines G, H and I, and totaled in Line J. House hunting trip information shall include Transportation Costs for Airfare **OR** Actual Travel Costs, plus accommodation and meal costs for up to 3 days on PEI:
- 1.2.3.4. Line G – Airfare : Airfare information shall include the names for each faculty/staff member, spouse and dependant. The total Airfare costs shall be provided in Line G.
- OR**
- 1.2.3.5. Line H: Actual Travel Costs: Mileage and meal costs are reimbursed on a Per Kilometer and Per Diem basis respectively. Mileage Costs shall be calculated by multiplying the number of kilometers travelled by the appropriate Per Kilometer rate. Meal Costs shall be calculated by multiplying the number of travelers by the number of days travelled, multiplied by the appropriate Per Diem rate.

The total Mileage cost, Meal Cost and Accommodation cost shall be provided and totalled in Line H.

A documented airfare quote shall be obtained to demonstrate that Actual Travel Costs do not exceed economy airfare via the most direct route.

- 1.2.3.6. Line I – Accommodation/Meals On PEI (Up to 3 days): The locations and total cost of accommodations shall be provided and totalled Line I. Meal Costs shall be calculated by multiplying the number of travellers by the number of days claimed on PEI, multiplied by the appropriate Per Diem rate.
  - 1.2.3.7. Line J – House Hunting Trip Total: The lesser of lines G and H plus I shall be provided in Line J;
  - 1.2.3.8. Line K – Moving Total: Lines E, F and J shall be provided in Line K;
  - 1.2.3.9. Line L - One Month’s Salary Per UPEI Appointment Letter shall be provided in Line L;
  - 1.2.3.10. Line M - Eligible Moving Expenses: The lesser of Lines K and L shall be provided in Line M.
- 1.2.4. **Total Claim**: Shall be calculated by adding the Relocation Total (Line D) and Eligible Moving Expenses (Line M).
- 1.2.5. The **Signature** of the faculty/staff member shall be provided and **Authorized** by the appropriate Vice President or Dean (if AVC).

**SECTION 2: ORIGINAL RECEIPTS**

- 2.1 Original receipts with the exception of the per diem meal allowance and the per kilometer rate, are required for claims made under this policy. Claims made to the University for reimbursement of relocation and moving expenses may not be claimed from any other source, except to the extent that such reimbursement shall result in a refund to the University. Likewise, relocation and moving expenses reimbursed from another source may not be claimed from UPEI.

**SECTION 3: ALLOWANCES**

- 3.1 Per Diem Meal Allowances

	Travel within Canada (CAD)	International Travel including the US (USD)
Breakfast	\$12.00	\$12.00

Lunch	\$18.00	\$18.00
Dinner	\$25.00	\$25.00
Total	\$55.00 CAD	\$55.00 USD

3.2 Vehicle "Per Kilometer" Allowance

3.2.1 Per kilometer rate to be paid shall be 40.0 cents.