

Relocation Process Checklist for Hiring Department

Offer

- Negotiate with the new hire the terms and condition of the relocation funding. This funding may consist of the Central Relocation Fund, departmental budgets and/or faculty budgets.
- Prepare and send a letter of offer confirming the relocation funding for the new hire.
- The new hire will sign and submit the letter of offer to your department.

Transporting Household Goods

- The new hire will contact one or more of UBC's designated moving companies to arrange a physical survey and submit the required documents to the moving company(ies).

For QMM, the new hire and the department should complete the UBC Contact and Information Sheet. For one of the CAUBO vendors: AMJ Campbell or Armstrong, the new hire should contact the moving companies directly for any required documents.

- Receive estimated quote(s) from the designated moving company(ies). If quotes are received from more than one moving company, get the new hire's preferred moving company.
- Submit a purchase requisition with the estimated quote through Workday to set up a Purchase Order (PO). For Workday resources and help visit the [Integrated Service Centre](#).
- Financial Operations in Vancouver will send the Purchase Order number to the department purchase requisition requestor and the moving company.
- The moving company will pick up, load and transport the household goods for the new hire.
- If there are changes during the move, the moving company may send revised quotes for approval. If these changes exceed the amount committed in the PO, submit a Change Order and the revised quote through Workday to modify the PO. For Workday resources and help visit the [Integrated Service Centre](#).
- The moving company will send the final invoice(s) to Financial Operations for payment processing.
- If the cost of the move exceeds the relocation allowance offered to the new hire, ask the new hire for reimbursement of the excess amount.

Other Relocation Expenses

- The new hire will incur other relocation expenses, such as travel, immigration fees, etc.
- Receive receipts or invoices and any other supporting documentation for eligible relocation expenses from the new hire.

Submit an expense report through Workday, attaching relevant receipts, invoices and any supporting documentation in Workday for processing reimbursement of eligible relocation expenses. For Workday resources and help visit the [Integrated Service Centre](#).

Central Relocation Fund

For Vancouver campus, submit an accounting journal through Workday to request reimbursement. Please attach a completed Relocation Reimbursement Claim Form, a copy of the general ledger of your department funding, and copies of invoices and receipts. For Workday resources and help visit the [Integrated Service Centre](#).

For Okanagan campus, prepare and submit the Relocation Reimbursement Claim Form, a copy of the general ledger of your department funding, and copies of invoices and receipts Finance Operations, UBC Okanagan in Kelowna.

Reimbursement of the eligible Central Relocation Fund allowance back to the department funding will be processed through Workday.

Leaving UBC

If the new hire voluntarily leaves the University within a 24-month period of the start date, calculate and request reimbursement of the amount of the relocation funding on a pro-rated basis of 24 months.