

## 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

- Download and complete the department contact information on the UBC Contact and Information Sheet.
- The new hire will contact Quality Move Management (QMM) to arrange a physical survey and submit the UBC Contact and Information Sheet.
- Receive an estimated quote from QMM.
- Prepare and submit a purchase requisition form and the estimated quote to Financial Operations in Vancouver to set up a Purchase Order (PO).
- Financial Operations in Vancouver will send the Purchase Order number to the department administrator and the moving company.
- QMM will pick up, load and transport the household goods for the new hire.
- If there are changes during the move, QMM may send revised quotes for approval. If these changes exceed the amount committed in the PO, prepare and submit a Relocation Change Request to Active Purchase Order form and the revised quote to Financial Operations to modify the PO.
- Once QMM sends a final invoice, forward the invoice with your department authorization to process payment of the invoice to Financial Operations.
- 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.

Prepare and submit requisition for payment forms or travel requisition for payment forms, along with receipts, invoices and any supporting documentation to Financial Operations in Vancouver or Finance Operations, UBC Okanagan in Kelowna for processing reimbursement of eligible relocation expenses.

Financial Operations in Vancouver or Finance Operations, UBC Okanagan in Kelowna will process the reimbursement of relocation expenses.

#### Central Relocation Fund

Prepare and submit the Relocation Reimbursement Claim Form, a copy of the general ledger of your department funding, and copies of invoices and receipts to Financial Operations in Vancouver or Finance Operations, UBC Okanagan in Kelowna.

Financial Operations in Vancouver or Finance Operations, UBC Okanagan in Kelowna will process reimbursement of the eligible Central Relocation Fund allowance back to the department funding.

#### 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.