RELOCATION FLOW CHART

Is the relocation service being offered to a new faculty, executive, or staff member?

STAFF — FACULTY — EXECUTIVE

STAFF

ROLE: DEPARTMENT
Review *Campus Policy #650-32* for allowable and disallowable moving expenses

ROLE: DEPARTMENT
Prepare a Purchase Requisition including the following entries: budget to be charged, present address, new address (if known), anticipated moving date, telephone numbers (home and office) where the employee can be reached, and the *signed appointment letter*. PR may then be sent to Procurement Service Department.

NOTE:
• The requisition should be prepared as early as possible, but not later than 30 days prior to the anticipated date of the move.
• Department established budget MUST BE provided by Buyer inquiry

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FACULTY

ROLE: DEPARTMENT
Review *Campus Policy #650-31* for allowable and disallowable moving expenses

ROLE: DEPARTMENT
Prepare a Purchase Requisition including the following entries: present address, new address (if known), old and new address for lab (if applicable), anticipated moving date, departmental contact name/number, telephone numbers (home and office) where the appointee can be reached, and the *signed offer letter*. PR may then be sent to Procurement Service Department.

NOTE:
• The requisition should be prepared as early as possible, but not later than 30 days prior to the anticipated date of the move.
• Faculty generally has NO LIMIT for relocation services, Central Funding will fund up to $10,000 towards the move.
• Buyer may accept a Letter of Intent (LOI) if exceptional approval justification is provided.

EXECUTIVE

ROLE: DEPARTMENT
Review *Regents Policy #7710* for allowable and disallowable moving expenses

ROLE: DEPARTMENT
Prepare a Purchase Requisition including the following entries: budget to be charged, present address, new address (if known), anticipated moving date, telephone numbers (home and office) where the employee can be reached, and the *signed appointment/offer letter*. PR may then be sent to Procurement Service Department.

NOTE:
• The requisition should be prepared as early as possible, but not later than 30 days prior to the anticipated date of the move.
• Executive generally have NO LIMIT for relocation services unless stated by Chancellor Office representative

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ROLE: PROCUREMENT
PR received and reviewed by Buyer
• Buyer ensures that requested information is provided along with the signed appointment/offer letter is attached
• If applicable, Buyer reviews to Exceptional Approval attachment for signature of the proper authority
  ◦ **STAFF:** Department Head
  ◦ **FACULTY:** Dean of the corresponding School
  ◦ **EXECUTIVE:** Chancellor Office Rep.
• If applicable, Buyer communicates the set budget, and appropriate measures in a case of budget exceeding

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ROLE: PROCUREMENT
Buyer encumbers P.O. followed by a Change Order with specified BURGESS MOVING AND STORAGE quoting.
• Upon evaluating the initial PR, if all documentation is in order Buyer will initiated a P.O. with an estimate to the future services.
• After receiving quotation from UCOP supplier Burgess, Buyer will issue a CH with the specified amount.

ROLE: PROCUREMENT
Invoice is recieved, Buyer will then perform an all-inclusive audit.
• Buyer is to evaluate all existing charges to ensure that they are appropriate to the corresponding Policy and/or accounted for within the Exceptional Approval.

ROLE: PROCUREMENT
Invoice will then be scanned, scan copy is to be attached to the PO. Hard copy is to be delivered to Accounting Services.

ROLE: PROCUREMENT
Generate an email to the appropriate representative with the request for a signature, include Accountant Analyst(s); Christopher Baxter and/or Miesha Collins (travelfeedback@ucr.edu).
◦ FOR STAFF: Signature required by the associated Dean
◦ FOR FACULTY: Signature required by the Department Head
◦ FOR EXECUTIVE(S): Signature required by Chancellor and/or appointee executive