



Moving Reimbursement Policy

Policy Type: Institutional Wide
Policy Owner: The Office of Human Resources
Policy Collaborators: Academic Affairs Finance & Administration

Origination Date: April 15, 2019
Effective Date: July 07, 2023
Next Review and Publication Date: December 2023

Butler University, founded on ideals of equity and academic excellence, creates and fosters a collaborative, stimulating intellectual learning environment. We are inspired to boldly innovate and broadly educate, enriching communities and preparing all learners to lead meaningful lives.

Butler University is committed to assisting employees who are eligible for relocation expenses. This policy sets forth moving guidelines and procedures.

ENTITIES AFFECTED BY THIS POLICY

New full-time staff (Director level and above), new tenure-line and continuing appointment faculty, non-tenure track full-time faculty holding at least a one-year appointment with the University, and faculty members who assume an administrative position (department chair or associate/assistant dean).

PROCEDURES

- 1) Moving expenses that are reimbursed whether the move is through a carrier or a self-move, are considered as taxable income within the current calendar year that the expense is incurred and subject to IRS guidelines (see below).
- 2) The employee is responsible for obtaining estimates from the carriers recommended below or others. Carriers include moving, storage rental, and portable container companies like U-Haul or PODS. **Please keep in mind that the busiest time for moves is May through September. The movers would appreciate as much advance notice as possible regarding your move.**
- 3) Once estimates have been received from all carriers, Butler encourages the employee to select the carrier with the lowest estimate. If the employee wishes to contract with a carrier whose estimate is higher, please note that the University only reimburses up to \$4,000 for moves through carriers. There are items in the move that are excluded if a carrier is used. Please see "Exclusions" listed below. The employee is responsible for making moving arrangements with the selected carrier.
- 4) Self-Moves – If the employee utilizes personal and/or private means like their own vehicle to move – if an eligible employee prefers to move oneself (without a carrier), Butler University will reimburse up to \$1,000 for this.
- 5) Non-tenure track faculty offered at least a one-year appointment with the University are eligible to receive up to \$500 in eligible moving expenses, regardless of moving distance.
- 6) Faculty members who assume an administrative position (department chair or associate/assistant dean) may be eligible through negotiation, at the discretion of the dean and provost, for additional moving expense reimbursement.
- 7) If the recommended carriers listed below are used, the University is billed directly. Any excluded items or ineligible expenses are then billed to the employee by the University. If a different carrier is used, the employee pays them directly and provides receipts to the University for reimbursement for eligible expenses up to \$4,000.
- 8) It is the responsibility of the employee to work directly with the payroll office on the taxable income and how it is applied.

The recommended carriers and contacts are:

Company	Contact	Phone	Email
Hogan/Mayflower	Frederick "Fritz" Lay	(800) 628-8991	flay@hoganmoving.com
Wheaton/Crown	Michael Knowles	317-379-4588	michael.knowles@wheatonmoving.com

- 9) Per IRS guidelines, effective January 1, 2018, reimbursable moving expenses became taxable fringe benefits to an employee (whether paid directly to an employee or paid directly to a moving company).
- If the employee elects to utilize one of the two moving companies named above, Butler will pay the moving company directly for the University approved amount. However, the amount that Butler pays the moving company is taxable income to the employee. Butler will deduct appropriate taxes from the employee's first three monthly paychecks (first six paychecks if paid bi-weekly) to cover the *employee's tax liability on the moving expense*.
 - If the employee elects to use any other approach to move to Indianapolis, the employee will incur all expenses associated with the move and submit receipts for reimbursement. The employee will receive a reimbursement check. The reimbursement amount is taxable income to the employee. Butler will deduct appropriate taxes from the employee's first three monthly paychecks (first six paychecks if paid biweekly) to cover the employee's tax liability on the moving expense, therefore, no taxes will be taken directly from the reimbursement check.

Exclusions if a carrier is used:

These are items that Butler does not cover as part of moving expenses if a carrier is used. The customer can work with the moving company to pay for these items directly.

Items not covered by Butler:

- Packing services and/or materials
- Insurance coverage *
- Items requiring special handling, such as antiques or pianos
- Unusually heavy equipment
- Personal relocation expenses, such as airline tickets, lodging, use of personal auto and food expenses incurred in the moving process
- Other expenses not normally considered household effects
- Storage of furniture and personal belongings **

*The recommended moves listed above do provide a set amount of insurance coverage free of charge to the customer (please check with mover for amount). *Anything over the quoted amount is charged to the customer.* This insurance coverage **does not apply to moves within the state of Indiana** (also known as an in-state move). *The customer must purchase the insurance coverage for in-state moves.*

**The recommended carriers listed above may provide a discount for these expenses, should the employee wish to pay for them directly.

Additional Charge by carriers:

The following items will incur an additional charge to the customer. The moving company contracts these services to a third-party vendor:

- Disconnecting and reconnecting washers and dryers
- Removal of wall-mount flat screen TV
- Remount of wall-mount flat screen TB
- Carton for flat screen TB
- Items requiring special handling, such as antiques or pianos
- Unusually heavy equipment