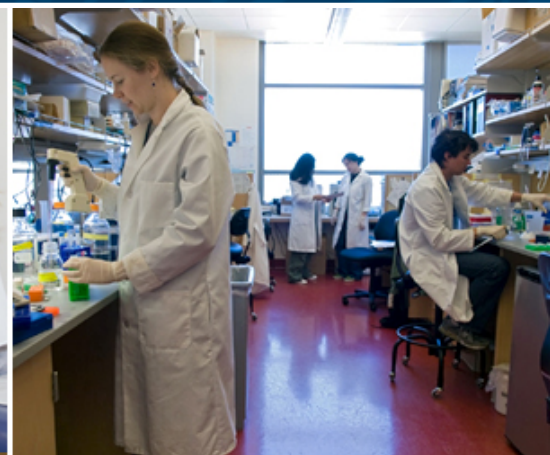


UC San Francisco School of Medicine



GME Needs Based Relocation Reimbursements
Academic Year 2019-20

Agenda

- Relocation Reimbursement Program
- Allowable Expenses
- Unallowable Expenses
- Required Documentations
- FAQs

Relocation Reimbursements

- Residents and clinical fellows (**ACGME and ABMS only**) **new** to graduate medical education at UCSF
 - Verification of program and PGY
 - Graduates of UCSF beginning as PGY1 are not eligible
- Reimbursement program funds **up to \$1,800 per trainee** on eligible moving and relocation (M&R) expenses
- All reimbursements are reported as **taxable income to the trainee** which is **subject to applicable income taxes**
- Relocation reimbursements are governed by the following University policy:

<https://policy.ucop.edu/doc/3420347/BFB-G-13>

Allowable Expenses

FORM OF TRANSPORTATION:

- Transportation expenses shall be reimbursed based on the **most economical mode of transportation** and the most commonly traveled route consistent with the authorized purpose of the trip.
 - Air – One way coach airfare for the trainee, family and domestic pets.
 - Travel must be direct. Stop-overs OK if part of the flight plan.
 - Land – Personal or rental vehicle
 - Mileage for personal vehicle @ \$0.18 per mile.
 - Cannot claim mileage on rental vehicle, but can get reimbursed for cost of gas.

Allowable Expenses

EN-ROUTE FROM OLD RESIDENCE TO SF:

- Parking and tolls incurred on the trip to SF
- Daily meal allowance for **actual cost up to \$62** when > 24 hours
- Lodging cost **no more than \$275 per night** before taxes and fees with a minimum of 300 miles driven per day by personal or rental vehicle.

MOVING HOUSEHOLD ITEMS:

- Cost of professional movers, packing materials, mailing and Household Goods Transit Insurance.
- Labor costs to assist in loading or unloading a moving vehicle.
- Storage fees for household goods up to 30 days.

Allowable Expenses

HOUSING:

- Temporary lodging arriving in SF 1 day prior to orientation start and **up to 30 days** after. Maximum nightly rate of \$275 before taxes and fees.
- When a traveler lodges with a friend or relative, a non-cash gift, such as flowers, groceries, or a restaurant meal, may be provided to the host. The actual cost of such gift may be reimbursed up to \$75.
- Short notice renters cancellation fees and unavoidable lease penalties.

Unallowable Expenses

FORM OF TRANSPORTATION:

- Travel expenses from a location other than the old resident unless it costs less. Comparison quotes required.
- Multiple trips back and forth from old resident to SF.
 - Flying
 - Business or First Class seating (train or plane) unless required to accommodate a medical need and covered by a Dr's note.
 - Indirect flights (i.e. to visit family, to collect other belongings or for a vacation etc.)
 - Driving
 - Vehicle insurance (CDW), travel or trip cancellation insurance/ fees. All University travelers are covered worldwide, 24/7 while on official travel status.

Unallowable Expenses

EN-ROUTE FROM OLD RESIDENCE TO SF:

- Travel expenses to/from campus.
- Childcare, babysitting or pet sitting fees.

MOVING HOUSEHOLD ITEMS:

- Specialty moving expenses (e.g. moving a collection of wines, musical instruments, recreational vehicles or sports equipment.)

HOUSING:

- Temporary lodging over \$275/night before taxes and fees.
- Permanent housing rent, rental deposit, groceries, utility fees, move in or HOA fees, long term parking fees.
- Furnishings for new housing.
- House or school hunting, getting to know the area expenses.

Required Documentations

- Complete [Travel Expense Voucher](#)
- Receipts required for **ALL** airline, lodging, vehicle rental, parking and other allowable expenses
- Receipts must show last 4 digits of credit/debit card number or if paid with cash, indicate so
- If name of payee on receipt is not the trainee please note the relationship of the payee to the trainee i.e. “The name of payee is my husband/ wife/ significant other/ parent” etc.
- Receipts must be legible and itemized. If not, attach a [Declaration of Missing Receipt form](#)

FAQs

- If my actual travel cost do not amount to the maximum allowable \$1,800.00. Can I claim the remaining balance?
 - **No. Only actual costs for M&R can be claimed.**
- Can I claim expenses traveling from my old school back to home then to SF?
 - **No. Only 1 trip's expenses can be reimbursed.**
- If there is a change of plane/ stopover en route to SF is that OK?
 - **Yes. As long as the stopover is part of the flight plan and not to accommodate a personal reason e.g visiting family.**
- I would like to travel business or first class. Can I claim that cost?
 - **Only if you have a medical need covered by a medical note.**

FAQs

- I want to break my journey and or travel in business class etc. *en route* to SF can I submit a comparison cost that is equivalent to a coach and or direct journey for reimbursement?
 - Yes, but make sure the comparison cost is during the same time period you traveled to SF.
- I will be driving from my old residence but after calculating the reimbursement I would receive, it's less than the flight cost. Can I claim the equivalent flight cost?
 - No. Only actual costs for M&R are allowed.
- I'm moving my own stuff but have a comparison quote from professional movers (but didn't use them) can I claim the larger amount anyway?
 - No. Only actual costs for M&R are allowed.

FAQs

- I moved straight into my permanent housing but have a balance left over from my M&R costs, can I claim the rest for rent.
 - No. Only *temporary* housing costs <30 days can be claimed.
- I received my acceptance letter but not in time to cancel my rent and I have a cancellation fee. Can I claim that fee?
 - Yes.
- I am renting a U-Haul and a friend is driving my personal vehicle to SF. Can their travel expenses be claimed including their return trip?
 - Only if it's less than using an equivalent professional service.

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