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 expenses incurred must be paid by the trainee, travelling spouse or shared expenses with another relocating trainee, in order to qualify for reimbursement. Expenses paid by family members (parents, siblings), relatives, friends etc. are unallowable and will not be reimbursed.

- 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 @ $0.17 per mile. (As of January 1st, 2020)
    - 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. Meals are reimbursable only if temporary lodging does not provide a proper area for cooking, such as a hotel.

- 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 residence 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
  - Use Speedtype MDO119RESI when completing the TEV.

- 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 etc.” All expenses incurred must be paid by the trainee, travelling spouse or shared expenses with another relocating trainee, in order to qualify for reimbursement.

- 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

- My parents helped pay for a portion of my relocation expenses, can I be reimbursed for these expenses?
  - No. Due to Federal Tax Regulation and UCOP policy, all expenses incurred must be paid by: the trainee, travelling spouse or shared expenses with another relocating trainee.

- I am relocating with my spouse and children, who is eligible for the $62 per day meal allowance?
  - Yourself and each member of your immediate family that is relocating with you is eligible for the $62 per day meal allowance.

- I am staying at a friend’s house in SF for X weeks before my lease starts and X weeks before my start date. Can I be reimbursed meals while at my friend’s house?
  - Temporary meals and lodging are only reimbursable 1 day before and up to 30 days after your start date.
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.

- Will I be reimbursed if I use personal credit card points or airline miles to book a flight?
  - If an individual decides to use personal points or credits to lower the cost of their airfare, we do not reimburse them for the equivalent value of those points/credits.
FAQs

- I purchased furniture while in the Bay Area as it’s cheaper than shipping it from my previous residence. Can I be reimbursed for the furniture and moving costs?
  - Furniture will not be reimbursed as UCSF does not pay trainees to furnish their households. Moving costs can be reimbursed as long as a comparison between the moving company at the previous residence & moving costs of the purchased furniture is provided.

- Can I receive reimbursement on items insured while in transport and/or in storage?
  - Insurance for items while in transit are eligible for reimbursement, but insurance for items held in storage are not reimbursable.

- My friend helped me move, can I purchase them a gift and receive reimbursement?
  - When a friend helps a trainee move, a non-cash gift, such as flowers, groceries, or a restaurant meal, may be provided to help move. The actual cost of such gift may be reimbursed up to $75.
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