1. My college hired a new employee that will be relocating from New York. On his way to Honolulu, he will make a personal stop in Las Vegas for one week. Do I need to request a relocation exception for this personal stop?

No, a relocation exception would not be required. A comparison flight itinerary excluding the personal stop should be obtained (New York – Honolulu). The actual and comparison itineraries should be compared and the airfare reimbursement would be limited to the lower of the two amounts.

2. The Chancellor approved my request to issue a PO to a vendor (a moving company) on behalf of my new employee. The new employee solicited three written quotes and selected the lowest vendor who bid $10,000. I can now proceed with issuing a PO to that vendor. True or false?

False. The department must comply with University procurement guidelines for small purchases (AP A8.250). As such, the use of SuperQUOTE is required unless an exception was approved via OPRPM Form 148 (Request for Exception to Use of SuperQUOTE in Source Selection). A HCE Certificate of Vendor Compliance would also be required.

3. I am requesting three relocation exceptions. The Chancellor is authorized to approve two of them and the VP for Budget and Finance/CFO is authorized to approve the third one. I should submit two separate relocation exception request memos; one to the Chancellor and a separate one to the VP for Budget and Finance/CFO. True or false?

False. A single relocation exception request memo should be submitted. The memo should be addressed to VP for Budget and Finance/CFO Kalbert Young, via Chancellor Robert Bley-Vroman, via the cognizant VC, from the Dean/Director.

4. My college recently hired a new, 100% FTE, temporary APT. The employee’s appointment period is for one year. Is this employee eligible to receive a relocation allowance?

Yes. The employee is a BOR appointee with a regular, full-time appointment of at least one year.

5. Two weeks after arriving in Honolulu, my new employee took a taxi from her apartment to the pier to pick up her personal vehicle that she shipped from the mainland. Is a relocation exception required for this taxi fare?

Yes. This exception would need to be approved by the VP for Budget and Finance/CFO. Only taxi to the airport on the day of departure and from the airport on the day of arrival would not require an exception.

6. My new employee purchased boxes and tape to ship his personal effects and professional materials from his former home to Honolulu. Are these expenses reimbursable?

Yes. These moving supplies are considered shipping/moving expenses.
7. Due to the fact that relocation costs are processed as after-the-fact reimbursements to appointees, prior approval for both excess and exception requests must be obtained. True or false?

True. No offer or commitment should be made to the appointee until approval has been obtained. Units sometimes specify “subject to Chancellor’s approval” in their offer letters.

8. Is it possible to process partial reimbursement payments?

Yes. Under unusual circumstances, partial reimbursement claims may be required because some support documents are delayed, family members are traveling at different times, some personal effects are shipped at a later date, etc. Complete reimbursement claims should be processed as soon as possible and no later than one year from the date of appointment.

9. My college hired a new employee that will be relocating from Denver. To minimize shipping costs, the new employee will drive her car from Denver to the pier in Los Angeles so it can be shipped to Honolulu. The distance from Denver to Los Angeles is about 1,000 miles and estimated drive time is 16 hours. For this road trip, can the new employee claim mileage? Toll charges? Parking fees? Meals? Lodging?

Assuming the cost of driving the car (including mileage, toll charges, parking fees, lodging, etc.), shipping it from Los Angeles, and airfare from Los Angeles to Honolulu is less than shipping the car directly from Denver and flying to Honolulu from Denver:

Mileage – Yes. The moving federal allowable mileage rate for 2016 is $0.19/mile.

Toll charges – Yes. Toll charges up to the day of arrival may be claimed for reimbursement.

Parking fees – Yes. Parking fees up to the day of arrival may be claimed for reimbursement.

Meals – No. Meals are considered a personal expense.

Lodging – Yes. Lodging is limited to overnight accommodations by the most direct and economical route, up to the day of arrival.

10. My new employee shipped his car to Honolulu one week prior to relocating from San Francisco. As such, he needed to rent a car in San Francisco for his last week there. Is this a reimbursable expense?

Rental car expenses at the employee’s former home would require approval by the VP for Budget and Finance/CFO. Assuming adequate justification is provided, this would be a reimbursable expense.

11. Prior to relocating to Honolulu, my new employee made a trip here so she could search for a home. Can she claim reimbursement for pre-move house hunting expenses?
Pre-move house hunting expenses would require approval by the VP for Budget and Finance/CFO. Assuming the expenses (ex. airfare, lodging, ground transportation) and duration of the trip is reasonable, this would be a reimbursable expense.

12. My new employee’s appointment date is March 1, 2016. The new employee will relocate to Honolulu prior to March 1, 2016, however, his spouse and dependent child will not relocate until Summer 2017. The reason for this is that the employee and his spouse want to allow their child to complete middle school at their former home. Can the employee claim reimbursement for his spouse’s and child’s airfare and shipping expenses in Summer 2017?

Relocation reimbursement claims delayed beyond one year from date of appointment would require approval by the VP for Budget and Finance/CFO. Assuming adequate justification is provided, this would be a reimbursable expense.

13. It has been my college’s internal policy to limit relocation allowances to $8,000. My dean wants to offer a relocation allowance of $15,000 to a new employee. Can we do this?

Relocation allowances are discretionary on the part of the program manager and are subject to funding availability. Since the allowance exceeds $8,000, Chancellor’s approval would be required. Assuming funds are available and there is adequate justification for the excess amount, this would be allowable.

14. My new employee sold her home in Portland prior to relocating to Honolulu. As such, she needed to stay at a hotel during her last three nights in Portland. Is this lodging cost reimbursable?

Temporary housing at the employee’s former home would require approval by the VP for Budget and Finance/CFO. Assuming the lodging rate is reasonable (use federal allowable rate as a guide for reasonableness) and adequate justification is provided, this would be a reimbursable expense.

15. Regarding relocation, what three criteria must be used as guidelines on all excess and exception requests?

1) The excess and/or exception is necessary to attract a candidate who would otherwise not relocate to Hawaii.
2) There is no other equally qualified and acceptable candidate who can be attracted without an excess and/or exception.
3) The total allowance shall not exceed the actual cost of relocation as determined by suitable documentation of the actual cost.

16. I submitted a relocation exception request for a relocation allowance of $15,000 and temporary housing in Hawaii after the day of arrival. That request was already approved by the Chancellor.
I was just informed that the appointee has now requested a rental car in Hawaii after the day of arrival. What do I do now?

A second relocation exception request memo must be submitted for Chancellor’s approval. This action memo should reference the initial action memo and clearly explain the sequence of events (previously received approval for the excess amount and temporary housing and now requesting approval for the car rental). The standard action memo format should still be followed.