RELOCATION GUIDELINES

Welcome to Carey Business School. This document sets forth policies and procedures to facilitate the household relocation of new Carey faculty, and includes the following:

• Relocation and Expense Reimbursement Guidelines
• JHU Suggested Moving Vendors (Appendix A)
• Useful Links and Resource Information
• Reimbursement Template: Used for reimbursement of all expenses, including house-hunting and moving (Excel spreadsheet)
• JHU’s Moving Expense Policies and Procedures

Relocation and Expense Reimbursement Guidelines

Terms: Relocation agreement and limit amount must be included in the employment contract and will be subject to the following terms:

• Total reimbursement for house-hunting and relocation costs shall not exceed limit amount stipulated in the employment contract letter,
• Relocating by a distance of more than 50 miles due to her or his appointment with Carey Business School,
• Relocation must take place within one year of employment start date,
• After employment has been accepted, expenses of reasonable relocation expenses should be properly documented (with proof of payment) and submitted to the Office of Faculty & Research (OFR) within 45 days of the move,
• Moving expenses are considered taxable by the IRS; and will be processed following the new faculty’s start date.

Moving Expenses

Moving expenses are considered taxable by the IRS, requiring JHU to report and withhold taxes for the employee. IRS Publication 521 “Moving Expenses” should be referred to for additional information. This publication and additional information/documents can be obtained through [http://www.irs.gov](http://www.irs.gov).

Also, please see the University Finance website for more on the tax classification of reimbursable moving expenses: [http://finance.jhu.edu/policyapp/displayGuidePDF.do?guideld=ME](http://finance.jhu.edu/policyapp/displayGuidePDF.do?guideld=ME)

Pre-move House-Hunting

Carey will reimburse reasonable expenses incurred for one trip for house-hunting (maximum 7 day, 6 night stay) in the Baltimore/Washington, DC area. The OFR will cover costs of airfare, lodging, meals, and ground transportation for you and your spouse, if married.

Due to tax reporting and withholding requirements relating to reimbursements for house-hunting trip expenses, it is preferable that a new faculty pay his/her own expenses and request reimbursement.
Request for reimbursement of house-hunting expenses should be submitted to the OFR within 45 days of the final move, and must include:

- Itemized receipts and proof of payment for all expenses, including meals (no alcohol).
  1. Option to claim per diem for meals (rates link on travel template)
  2. Adhere to meal limits per person: Breakfast $25 / Lunch $35 / Dinner $75
- Lodging bill / folio, indicating proof of payment (please refer to the Required Documentation tab of the reimbursement template)
- Full airline or train itinerary, indicating itemization and proof of payment.

Provide completed travel reimbursement template, original receipts, and supporting documents (organized by date) to the OFR.

Reimbursement of house-hunting expenses are considered taxable income by the IRS (taxes are withheld) and will be reimbursed through Payroll once the employee begins work.

**Estimates by Moving Companies**

Carey will pay for reasonable moving costs for your relocation to the Baltimore/Washington DC area, if greater than 50 miles. This expense is considered taxable income by the IRS; the employee will notice the tax deducted from their paycheck. New faculty must obtain and submit quotes from three separate vendors for the moving of household and personal items to the OFR. Commonly, the lowest bid is selected. However, if a vendor with a higher quote is preferred, please provide justification in your email when sending the quotes. We will take your preference into consideration when determining the moving vendor.

**The University provides a list of moving vendors as a courtesy (Appendix A). New faculty members who are relocating may wish to contact vendors on this list first. If these vendors are unable to meet the employee’s (new faculty member’s) needs, then other moving providers may be utilized. Some of these vendors (e.g. The Talbot Group or The MIGroup) will obtain three bids for the faculty member.**

Once a moving vendor is selected, the faculty member will be informed via email. Below are the three payment options and processes, in order of preference:

- **Invoice:** The OFR will process this payment, providing a copy to Carey Finance/Carey Payroll. Vendors already set up in the University’s finance system (JHU vendor list) should receive payment within 7-10 days after processing. Vendors that need to be added to the University’s finance system should receive payment within 6-8 weeks.

- **Self-pay:** New faculty member secures the selected mover and pays for the moving expenses out-of-pocket. Carey will reimburse faculty member for moving expenses (please see below for additional details) via travel reimbursement.

- **Purchase Order:** Some moving companies may require a Purchase Order. The OFR will process this payment, providing a copy to Carey Finance/Carey Payroll. Vendors already set up in the University’s finance system (JHU vendor list) should receive payment 2-4 weeks after processing. Vendors that need to be added to the University’s finance system should receive payment within 6-8 weeks.
Requests for Reimbursement for Out-of-Pocket Moving Expenses

Requests for reimbursement of out-of-pocket moving and relocation expenses should be submitted within 45 days of the move. Provide completed travel reimbursement template, original receipts, and supporting documentation (organized by date) to the OFR Administrative Coordinator.

Examples of reimbursable expenses:

- Packing, crating, and shipping furniture and other household items
- Shipping automobiles and pets
- Storing and insuring items for a 30-day period after moving out of the former home and before delivery to the new residence. Employee will be responsible for payment beyond 30 days (not reimbursable).
- Transportation costs, and lodging for the new faculty and his or her spouse and dependent children while traveling to the new location (final trip only)
- Meals
  1. Option to claim per diem for meals (rates link on travel template)
  2. Adhere to meal limits per person: Breakfast $25 / Lunch $35 / Dinner $75

IRS guidelines for the actual moving trip for household members are specific to one trip (one-way) per new faculty member and family (spouse and dependent children). The trip must be taken in the most direct route to qualify for reimbursement. One-way air coach transportation for the new faculty and family will be reimbursed. If air travel includes a personal component, reimbursement is based on the most direct route from the former home to new residence; or the actual airfare purchased, whichever is less. Comparable travel itineraries (obtained at the same time as final booking) must be submitted.

Helpful Hints

- Receipts are always necessary to substantiate moving expenses claims. Employees should save all itemized receipts. Receipts for meals should include the names of all in attendance. Alcohol, tax on alcohol, and the percentage of the tip for the alcohol are not reimbursable.
- Tape, boxes, and packaging materials are taxable expenses.
- The current mileage rate for move-related expenses can be found at: http://www.controller.jhu.edu/depts/tax/mileage.html

General Non-Reimbursable Expenses considerations

Expenses to prepare a home for sale are not reimbursable, nor are expenses for real estate commissions or closing costs. Expenses for obtaining Maryland or DC drivers’ licenses, registering vehicles, and emissions test fees, etc. are not moving expenses and are not reimbursable. The University will not reimburse any employee for purchasing a vehicle to be used for moving, even though this might cost less than renting a similar vehicle for the move. The University does not reimburse employees for household goods purchased to replace goods left behind because the employee elected not to move them. Temporary living expenses are not reimbursed (i.e. hotel for one or more nights after move to area to await home readiness).

Please contact the OFR carey.faculty@jhu.edu or the Finance team at Carey carey.finance@jhu.edu if you have any questions.
## Appendix A: JHU Suggested Vendor List

<table>
<thead>
<tr>
<th>Hopkins Preferred Vendors (Movers)</th>
<th>Vendor #</th>
<th>Address</th>
<th>Contact</th>
<th>Telephone #</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advance Relocation Systems (ATLAS)</strong></td>
<td>1000262</td>
<td>11500 CROSSROAD CIRCLE, STE A</td>
<td>DEBBI BOWLING</td>
<td>800-296-8950 x22</td>
</tr>
<tr>
<td>Domestic &amp; Intl Movers</td>
<td></td>
<td>Baltimore, MD 21220</td>
<td>DBOWLING@ADVANCE RELO.COM</td>
<td>410-574-8406 Fax</td>
</tr>
<tr>
<td><strong>Hoffberger Moving Services LLC</strong></td>
<td>1015009</td>
<td>1406 Shoemaker Rd</td>
<td>SEAN QUINN</td>
<td>410-825-3344</td>
</tr>
<tr>
<td>MidAtlantic ONLY (MD, W Va, DE, PA, VA)</td>
<td></td>
<td>Baltimore, MD 21209</td>
<td><a href="mailto:SQUINN@HSMOVERS.COM">SQUINN@HSMOVERS.COM</a></td>
<td>410-977-0679 Cell</td>
</tr>
<tr>
<td><strong>TheMIGroup</strong></td>
<td>1007133</td>
<td>106 Lukens Drive</td>
<td>Scott Sheldon</td>
<td>800-734-6925</td>
</tr>
<tr>
<td>Domestic &amp; Intl Movers</td>
<td></td>
<td>New Castle, DE 19720-272</td>
<td><a href="mailto:scott.seldon@migroup.com">scott.seldon@migroup.com</a></td>
<td>302-778-0916 Fax</td>
</tr>
<tr>
<td><strong>The Talbot Group, Inc.</strong></td>
<td>1010363</td>
<td>PO Box 595</td>
<td>Ernie Coshonis</td>
<td>800-654-6877x22</td>
</tr>
<tr>
<td>Domestic and International Movers</td>
<td></td>
<td>Avon, CT 06001</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>United Van Lines</strong></td>
<td>1010997</td>
<td>6465 Frankford Ave.</td>
<td>Chris Jenkins</td>
<td>904-306-7680-Intl'</td>
</tr>
<tr>
<td>Domestic; International</td>
<td></td>
<td>Baltimore, MD 21206</td>
<td>Lenny Hampton</td>
<td>877-740-3036-Dom</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tracie Cohee</td>
<td>202-696-1494</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>202-797-5614</td>
</tr>
<tr>
<td><strong>Whalen’s Moving &amp; Storage Co, LLC</strong></td>
<td>2021428</td>
<td>PO BOX 667</td>
<td>Stephanie Fowler</td>
<td>800-759-4253</td>
</tr>
<tr>
<td>Domestic &amp; Intl Movers</td>
<td></td>
<td>Crofton Falls, NY 10519</td>
<td><a href="mailto:CAREFUL@MOVEWHALENS.COM">CAREFUL@MOVEWHALENS.COM</a></td>
<td>914-241-1711</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>914-241-3148</td>
</tr>
<tr>
<td><strong>ALLIED VAN LINE</strong></td>
<td>2068055 /</td>
<td>4761 Solutions Center</td>
<td>Domestic Quotes Dial:</td>
<td>1-800-444-6787</td>
</tr>
<tr>
<td>Household; Long Distance; Cross County; Intersate</td>
<td>1000503</td>
<td></td>
<td>International Quotes</td>
<td>1-800-444-6787</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>North American Van Lines, LLC</strong></td>
<td>2014704 /</td>
<td>4768 Solutions Center</td>
<td>Domestic Quotes Dial:</td>
<td>1-844-363-0599</td>
</tr>
<tr>
<td></td>
<td>1007854</td>
<td></td>
<td>International Quotes</td>
<td>1-844-392-6116</td>
</tr>
<tr>
<td><strong>Higher Educationa Relocation Specialist (HERS)</strong></td>
<td>1018553</td>
<td>8 MACAULAY ROAD</td>
<td>Linda Foley (CS Coordinator)</td>
<td>1-914-833-4726</td>
</tr>
<tr>
<td>Collins Brothers Moving</td>
<td></td>
<td>KATONAH, NY 10536</td>
<td><a href="mailto:lfoley@collinsbros.com">lfoley@collinsbros.com</a></td>
<td></td>
</tr>
</tbody>
</table>
Helpful Links and Resources

Below are links to information resources you may find useful for your relocation to the area:

- Relocation information from JHU: http://hopkinsworklife.org/worklife/relocation.html
- A comprehensive website about the neighborhoods of Baltimore City: http://livebaltimore.com/
- JHU incentive program to live near work: http://web.jhu.edu/lnyw/neighborhoods.html
- Registering your vehicle in Maryland: http://www.mva.maryland.gov/Vehicle-Services/REG/NewtoMd.htm
- Registering your vehicle in DC: http://dmv.dc.gov/service/dmv-vehicle-services
- Maryland public schools: http://marylandpublicschools.org

Reimbursement Template

Please download the current Travel Reimbursement Template (used for reimbursement of all expenses, including house-hunting and moving) here: https://carey.jhu.edu/inside/office-of-finance/finance-forms-links