# logo_purple**PAYROLL SERVICES**

##### Moving & Relocation Checklist

When the University chooses to pay moving and relocation expenses, it must do so within the limitations and restrictions in State Moving and Relocation regulations. The following information is to assist in moving and relocating employees and their families as quickly as possible, and at a fair and reasonable cost to the University. Please use the guidelines outlined below when offering moving and relocation allowances to new employees.

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|  | **Submit the signed M&R Agreement to Payroll Services BEFORE the employee incurs any M&R expenses.** |
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|  | Inform the employee that all M&R expenses are **TAXABLE** at the supplemental rate (currently 22% federal, plus applicable state and FICA taxes) |
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|  | Inform the employee that the University does have contracted/preferred movers…  Lawrence Transportation Systems 1/800-336-9626 Contact Justin Key or Michelle Miller  Dunmar Moving 1/866-971-4322 Contact Britt LaLiberte or Katy Phillips  Note: International moves are also handled by these movers. |
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|  | Inform the employee of the three bids requirement for third party movers (unless using the University’s preferred movers) and that the three bids should be submitted to Payroll Services for review prior to making a formal commitment to use the third party mover/common carrier. |
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|  | Inform the employee that claims must be itemized and original receipts are required (excludes meal receipts; meal per diem applies). |
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|  | Forms required w/backup documentation: Voucher, M&R Expense Summary, and M&R Agreement |
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|  | Reference the employee to the [University Financial Procedures, Section 5010](http://www.jmu.edu/finprocedures/5000/5010.shtml) and to [Payroll Services M&R web-page](http://www.jmu.edu/payroll/relocation.shtml) for additional information on what items are and are not reimbursable and additional instructions on completing the necessary paperwork to authorize reimbursements. |

Please contact Sherry Willis at [willissl@jmu.edu](mailto:willissl@jmu.edu) or at x8-8034 for further clarification or if you have additional questions regarding the University’s Moving and Relocation Policy.