UNIVERSITY OF CALIFORNIA, RIVERSIDE

Procurement

RELOCATION FLOW CHART

Is the relocation service being offered to a new faculty, executive, or staff member?

STAFF | FACULTY | EXECUTIVE

ROLE: DEPARTMENT

Review *Campus Policy #650-32* for allowable and disallowable moving expenses

ROLE: DEPARTMENT

Prepare a Purchase Requisition including the following entries: budget to be charged, present address, new address (if known), anticipated moving date, telephone numbers (home and office) where the employee can be reached, and the *signed appointment letter.* PR may then be sent to Procurement Service Department.

NOTE:
- The requisition should be prepared as early as possible, but not later than 30 days prior to the anticipated date of the move.
- Department established budget MUST BE provided by Buyer inquiry

ROLE: DEPARTMENT

Review *Campus Policy #650-31* for allowable and disallowable moving expenses

ROLE: DEPARTMENT

Prepare a Purchase Requisition including the following entries: present address, new address (if known), old and new address for lab (if applicable), anticipated moving date, departmental contact name/number, telephone numbers (home and office) where the appointee can be reached, and the *signed offer letter.* PR may then be sent to Procurement Service Department.

NOTE:
- The requisition should be prepared as early as possible, but not later than 30 days prior to the anticipated date of the move.
- Faculty generally has NO LIMIT for relocation services. Central Funding will fund up to $10,000 towards the move.
- Buyer may accept a Letter of Intent (LOI) if exceptional approval justification is provided.

ROLE: DEPARTMENT

Review *Regents Policy #7710* for allowable and disallowable moving expenses

ROLE: DEPARTMENT

Prepare a Purchase Requisition including the following entries: budget to be charged, present address, new address (if known), anticipated moving date, telephone numbers (home and office) where the employee can be reached, and the *signed appointment/offer letter.* PR may then be sent to Procurement Service Department.

NOTE:
- The requisition should be prepared as early as possible, but not later than 30 days prior to the anticipated date of the move.
- Executive generally have NO LIMIT for relocation services unless stated by Chancellor Office representative

ROLE: PROCUREMENT

PR received and reviewed by Buyer

- Buyer ensures that requested information is provided along with the signed appointment/offer letter is attached
- If applicable, Buyer reviews to Exceptional Approval attachment for signature of the proper authority
  - **STAFF:** Department Head
  - **FACULTY:** Dean of the corresponding School
  - **EXECUTIVE:** Chancellor Office Rep.
- If applicable, Buyer communicates the set budget, and appropriate measures in a case of budget exceeding

ROLE: PROCUREMENT

Buyer encumbers P.O. followed by a Change Order with specified BURGESS MOVING AND STORAGE quoting.

- Upon evaluating the initial PR, if all documentation is in order Buyer will initiated a P.O. with an estimate to the future services.
- After receiving quotation from UCOP supplier Burgess, Buyer will issue a CH with the specified amount.

ROLE: PROCUREMENT

Invoice is recieved, Buyer will then perform an all-inclusive audit.

- Buyer is to evaluate all existing charges to ensure that they are appropriate to the corresponding Policy and/or accounted for within the Exceptional Approval.

ROLE: PROCUREMENT

Invoice will then be scanned, scan copy is to be attached to the PO. Hard copy is to be delivered to Accounting Services.

ROLE: PROCUREMENT

Generate an email to the appropriate representative with the request for a signature, include Accountant Analyst(s); Christopher Baxter and/or Miesha Collins (travelfeedback@ucr.edu).

- FOR STAFF: Signature required by the associated Dean
- FOR FACULTY: Signature required by the Department Head
- FOR EXECUTIVE(S): Signature required by Chancellor and/or appointee executive