

IOWA STATE UNIVERSITY
MOVING INFORMATION PACKET

(last updated March 2023)

IOWA STATE UNIVERSITY PROCUREMENT SERVICES

515-294-4860

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INTRODUCTION

This Moving Information Packet will summarize Iowa State University policies and procedures regarding moving your household goods.

We hope your move is a pleasant one and welcome to Iowa State University!

Please do not reach out to Beltmann Moving or North American Van Lines directly, this contract requires a referral to receive ISU contract pricing. Please contact Tisha Campbell 515-294-4542 tishac@iastate.edu for the referral.

DEFINITIONS

Booking Agent: The moving agency responsible for arranging and completing your household move.

Estimating Agent: Agent responsible for estimating the transportation weight and cost of your household move. This agent may or may not be directly employed by the booking agent.

Shipper: The individual moving from their household is the shipper.

Guaranteed Not To Exceed (GNTE) Estimate: Clearly describes all services to be provided and the itemized listing of expenses associated with the shipment. The total amount of the GNTE estimate is the maximum expense that the booking agent may invoice for the shipment.

Bill of Lading: A contract between the shipper and the mover. This document is required by law for every shipment moved. The shipper is entitled to a copy of the lading. If you do not agree with the lading, note your objections or damage on all copies of the lading before signing. By signing the lading, you indicate the items have moved and services have been performed.

Line Haul Transportation Rate: The rate at which your household goods will be moved. It is based on the household goods total weight and mileage between origin and destination.

Carrier: The company or proprietor hauling your household goods from origin to destination.

Additional Transportation Charge -- Origin: This charge is used to offset the high cost of loading, unloading, and deadheading equipment from low tonnage areas.

Additional Transportation Charge - Destination: (See Additional Transportation Charge Origin.)

Insurance Related Revenue (Surcharge): Carriers are allowed to assess an insurance surcharge to help recoup increased expenses in premiums for property and personal liability insurance. ISU is traditionally exempt from this charge because of the negotiated contract terms.

ITEMS TO KNOW REGARDING YOUR MOVE

- Iowa State University Procurement Services phone number is 515-294-4860. Calls may be made to this number between 7:30 a.m. and 4:00 p.m. Ask for Tisha Campbell, the Procurement Agent handling household moving services or e-mail tishac@iastate.edu. In all cases, please identify yourself as an incoming employee to ISU and leave a return telephone number.
- As of January 1, 2018 all moving expenses are taxable. ISU is required to deduct this withholding from the employee's paycheck during the month in which the reimbursement is made. All expenses must be appropriately documented with original receipts. Undocumented moving expenses, regardless of the type of expense, are considered taxable and subject to withholding.
- Individual departments at ISU establish a maximum fixed dollar amount they are willing to contribute to the cost of your move. Departments are allowed to pay reasonable moving expenses in accordance with state and/or institutional policies.
- Someone from your household, preferably an adult, must be at the residence at the time of the estimate to answer questions. They should also be available on both the day of the move to let the driver in and the day of unloading to unlock the new residence and direct the driver as to which containers go to which room, etc. It is important to be on time.
- During your household estimate, inform the estimating agent of all potential stops that may be required to pick up additional goods (e.g., offices, laboratories, shops, etc.). Inform the agent about all goods to be moved. If you know the layout of the residence where you are moving, tell the estimating agent about the number of floors, steps, and distance from unloading access, etc.
- If you add goods to your household after the estimates are complete, please contact the booking agent and inform the booking agent about the nature of these goods.
- Be aware of what the original "guaranteed not to exceed" estimate totals. If the estimating agent, booking agent, or driver requests that you sign an addendum to add additional weight, politely refuse and have them contact the ISU Procurement Services at 515-294-4860. Situations arise where additional expenses may be encountered but these additional expenses need to be approved by ISU before proceeding with the move.
- The shipper is not authorized by ISU to sign moving contracts or addenda to "guaranteed not to exceed" estimates. By signing, the individual becomes personally responsible for all financial obligations associated with the contracts or addenda.
- The shipper is required to sign a freight bill of lading and inventory sheets after loading. Please read all paperwork carefully and note all objections before signing. Retain both forms for your reference. Inventory sheets are your record of what was loaded on the moving van.
- Once household goods are loaded, the driver is contractually bound to deliver and unload your goods.
- Under our current contract, drivers and unloaders are not obligated to arrange furniture once it is brought into the proper room. Furniture arrangement is the responsibility of the shipper.
- The shipper is required to sign for his/her household goods after unloading. **Important: Please inspect your goods and note damages on the bill of lading or inventory sheets before signing, if possible.** If damage is discovered after the carrier has left, contact the booking agent responsible for your move and request guidance on filing a claim. Time may not allow for inspection of every box or individual item. Damaged goods

Packed By Owner (PBO) may be eligible for claims only when damage to the box/container is evident.

- Valuables such as jewelry, legal papers and money should be moved by the shipper. It is advisable to keep those items in a secure location while packing, moving and unpacking in order to avoid any possible problems.
- If shipping your clothing with your household items be sure to keep enough with you to accommodate work schedules etc.

Benefits of Contracted Moving Services through a Contract Carrier

Discount Rate The contract carrier has provided a standardized or uniform discount rate (percentage) to be applied against all ISU moves. This discount ensures that all employees are receiving the same benefit to assist the University and shipper in receiving a quality move at a reasonable price.

Frozen Rates The applicable tariff rates that determine the itemized cost of your move have been frozen for the term of the contract. This is in addition to the frozen discount rate (percentage) noted above.

Maximum Value Protection Coverage (Valuation)

- “Maximum Value Protection” (MVP) is included on all shipments at a value of \$7.00 per pound times the actual weight of the shipment up to \$125,000 at no cost to the shipper.

Additional coverage may be purchased by the shipper at a rate of \$.50 per \$100.00 of excess valuation.

NOTE: Valuation is NOT insurance. Valuation is the predetermined limit of liability as stated on the moving contract or bill of lading. This is automatically part of the contract with no extra cost. In most cases, valuation has no relationship to the actual value of your goods. This coverage includes lost, damaged and destroyed property. The coverage will pay for the repair or replacement of the goods.

- It is recommended that, as a shipper, you verify the replacement cost of your household goods with your insurance company before moving. It also is recommended that you check your personal household insurance policy to see if your homeowner’s policy extends coverage on your household while moving.
- As the shipper, you shall have the opportunity to declare your total household valuation for the carrier’s records before the move takes place, and you are encouraged to do so.

How is Maximum Value Protection Coverage administered? As with all insurance, it is the responsibility of the policyholder (shipper) to provide documentation about replacement cost when an item is damaged or destroyed. If an item is damaged and repairable, a carrier reserves the right to repair the damage without paying for a new item. If an item cannot be repaired to its original state, a carrier requires shipper to price a like or similar item at today’s market price. Upon review and approval, carrier shall issue payment to shipper to replace the item.

A household with \$100,000 coverage does not automatically mean that full coverage of \$100,000 is provided if a shipment is partially or completely destroyed. Replacement coverage requires the shipper to provide adequate documentation regarding costs for

replacing destroyed items, with the availability of receiving up to \$100,000 for replacement.

Claims will be processed within 30 days of receipt or moving company will make a payment of fifty dollars (\$50) per day for each day the claim is not finalized to the shipper.

Shipper has one year after the date of delivery to "RESOLVE" a claim. This means that your claims must be submitted (at minimum) 9 months after your goods are delivered.

Rate Adjustments ISU and the shipper are exempt from all seasonal rate adjustments for the duration of the contract.

Guaranteed Pack/Load/Deliver The carrier guarantees the days they will pack, load, and deliver. Note your schedule and, if delays occur due to poor scheduling or other related reasons under the carrier's control, you (as the shipper) are eligible for compensation, as described below.

- **Penalties for Delay** On shipments that exceed the guaranteed pack/load/delivery schedules, a maximum \$225-per-day penalty (or \$50/day for motor vehicle transportation) may be charged against the carrier to cover actual incurred living expenses or other shipper expenses. The shipper is not required to submit receipts but must complete a claim form and submit the claim for payment. This penalty is payable to the shipper. Should you have concerns or questions, contact the Procurement Services.
- **Pairs and Sets** The carrier shall be liable for pairs and sets in the event that partial damage or loss occurs, with the exception of silver, gold (flatware), china, and glassware (which are covered for actual loss or damage to an individual piece or place setting). Example: If shipper has matching nightstands and one stand is permanently damaged or destroyed, the carrier shall be obligated to replace both stands so shipper maintains a matching set.
- **Inherent Vice** The carrier will be liable for mechanical or electrical derangement, except as it may apply to motorized vehicles of every description and watercraft of every description. This coverage does not extend to pre-existing conditions and/or normal maintenance and cleaning.

Electronic or mechanical items, such as personal computers, are to be the liability of carrier, to provide compensation for repair and replacement of damage during the period they are responsible for the items. Many carriers do not compensate for unseen damages to electronic or mechanical goods unless actual damage can be seen. Inherent vice is protection against damage to mechanical or computerized items that may be damaged internally during the household move. This damage may not be obvious by visual inspection but can be determined by a trained professional. ISU suggests that, during the estimate or during packing, the shipper power all electronic items and have the carrier representative observe the item while functioning.

Guaranteed Not To Exceed Estimates (GNTE)

- The carrier is required to perform a guaranteed not to exceed estimate on your household move. This estimate would state the maximum dollar amount that would be charged against your household move. If the actual charges incurred during your move are less than the GNTE, the actual charges shall apply. If the actual charges are greater than the GNTE, the GNTE charge shall apply. The lower expense always applies.
- Procurement Services shall contact the carrier and provide a referral for your move. The carrier is responsible for contacting you (the shipper) to arrange a date and time to perform an estimate. Notify Procurement Services if you are not contacted.
- Seeking competitive estimates from other carriers is not necessary. The contract that ISU operates under has been competitively bid and awarded to the low-bid company.

Arrangement of Your Move Via the Carrier

- An ISU department offering moving services to an incoming employee is responsible for contacting Procurement Services (294-4542) to inform the procurement agent in charge of household moving about a pending move. As the shipper, please verify your respective department has made this contact.
- The procurement agent shall request the following written information from the department and/or directly from the shipper, preferably via email.
 - Name of the individual moving.
 - Home and work phone number of the individual.
 - Origin and destination of the move.
 - Maximum dollar amount allotted for the move.
- Upon receipt of the above information, a Moving Information Packet shall be directed to the individual moving. Depending on scheduling of the employment hiring and scheduling of moving dates, the packet may be obtained at any time.
- Procurement Services shall notify the carrier's representative and forward to them pertinent information concerning the individual being moved.
- A carrier's representative shall contact the incoming employee to initiate necessary arrangements. Please do not contact the carrier yourself, the move needs to be referred by ISU.

Our Carrier is:
Beltmann Group (North American Van Lines)
Toll Free: 800-859-4440
Direct: 630-576-5560

- All arrangements, after the initial contact, can be handled directly between the individual and the moving company. Procurement Services is always available for assistance and to answer questions.
- All invoicing shall be forwarded to Procurement Services, except when an individual is paying for the entire move personally or has costs above the dollar amount authorized by the employing department.
- Procurement shall initiate the necessary paperwork for any payment from ISU.

Maximum Allowance for a Household Move

Hiring departments at Iowa State University may pay reasonable moving expenses in accordance with state and/or institutional policies for packing and moving of a person's household goods.

Containers and Packing/Unpacking

ISU will pay for the containers and packing/unpacking of those containers up to the designated dollar amount determined by the department. ISU also covers the unpacking of crates, mattress cartons, mirror cartons, dresser mirrors and the reinstallation of those mirrors, and specially crated items such as artwork or items that require individually designed crates.

Items Not Covered by ISU

Iowa State University "does not" pay for moving animals or plants or for storage fees or for gratuity paid to the movers. Boxes and packing materials may be picked up curbside by your selected garbage service and is not a service provided by the moving company that is covered by ISU. ISU recommends that moving boxes be broken down when left at curbside.

Invoicing

The invoicing or partial invoicing (for the amount the employing department agrees to pay) is to be sent directly to ISU Procurement Services for payment. The remaining charges to be paid by the shipper are on a COD basis. Cashiers check or credit card is acceptable for COD.

Moving Using Rental Equipment

Reimbursement for the use of rental equipment for a do-it-yourself move may be authorized, if complete expense documentation is submitted. No reimbursement will be allowed for hiring an individual to help with the loading or unloading of your household or professional goods. If you paid a company directly for labor services and have an itemized receipt showing these services, it may be reimbursable. When renting the equipment, you (the shipper) are responsible for paying the rental agency. You may file for reimbursement of your rental fees. Individuals are to process reimbursement charges through their hiring department. Standard rental insurance offered by the rental agency is covered by ISU, when authorized by the employing department.

Moving Using Personal Equipment

On some occasions, individuals may wish to utilize their own equipment to perform their move. Before moving, Procurement Services may require a written estimate from the shipper outlining the expected moving expense. This estimate is to include the mileage utilizing the most direct route from origin to destination and provide estimated fuel costs. The estimate should not contain depreciation, repairs, or parts for personal equipment or purchase of additional equipment, as these items cannot be reimbursed. This potential estimate, if requested, shall be compared against the cost of utilizing a rental agency to determine cost effectiveness.

ISU OFFICE POLICY GUIDE ON HOUSEHOLD MOVING

The following section is from the Iowa State University Office Policy Guide and gives the complete description of expenses covered by ISU.

Moving Expenses for New Employees

When an employing unit's administration believes it is necessary to attract specific personnel, reimbursement of expenses for packing and moving a new employee's household goods and other personal effects for full-time employees, including faculty and institutional officials, professional and scientific staff, and other full-time employees who are comparable in rank to assistant professor or above. Packing and moving expenses for full-time employees not defined above may be granted by specific approval of the appropriate dean/director or the designee. Where required in this section, specific approval shall be given and witnessed by authorizing signatures on the appropriate document, i.e., purchase requisition, Disbursement Voucher etc.

When the decision is made to assist with relocating an employee by paying household moving expenses, a new employee Moving Information Packet should be requested from Procurement Services (294-4542). This packet includes information, which will assist in the expedient processing of household moving payments. Centrally budgeted University funds are not available for this purpose. The eligibility, limitations, and procedural requirements are as follows:

1. Based upon the university's established travel policies, interview trips for prospective faculty and staff may be reimbursed by Disbursement Voucher.
2. After a new staff member has accepted employment, travel expenses may be reimbursed for one trip for the staff member and spouse for the purpose of arranging housing. Subsequent house-hunting trips may be authorized by the specific approval of an authorized individual (defined above). Reimbursement of these items constitutes taxable income to the employee.
3. Reimbursement may include moving company charges for packing, moving, insurance, and unpacking the individual's household goods or other personal effects, up to a reasonable amount as determined by the hiring entity or as in accordance with state and/or institutional policies.
4. Additional costs, associated with moves from two households, will require the specific approval of an authorized individual (defined above). **Expenses associated with home sale or lease breakage will not be reimbursed.**
5. Reimbursement for moving expenses shall not include moving plants or animals, nor shall it include payment of storage fees.
6. Reimbursement for the use of rental trucks or trailers may be authorized if complete documentation is presented, which includes receipts for gasoline purchases and truck rental. No reimbursement will be made for the hiring of assistance to help with loading or unloading of personal effects of household goods.
7. Personal travel or temporary living expenses, associated with accepting new employment, for an individual and his or her immediate family, may be reimbursed. Such reimbursement is limited, however, to mileage for two vehicles and for travel using the most direct route. Reimbursement of temporary housing expenses, meals, and mileage constitutes taxable income to the employee.
8. Upon submission of full documentation (including copies of all paid bills or invoices from an authorized commercial mover), the staff member will be reimbursed. By utilizing a

properly approved purchase order, the University's portion of the moving expense may be paid directly to the moving company. The new faculty/staff member will continue to be responsible for the balance of any charges incurred.

9. The university has established a moving services contract, through a competitive bid process, which offers significant discounts and several additional features to facilitate the moving process. Either the hiring department or the newly hired employee should contact the Procurement Services for assistance before contacting moving firms.
10. When not utilizing the moving services contract, the new faculty/staff is responsible for paying personally and turning in receipts for reimbursement if ISU's contracted vendor is not used.

IRS TAXABLE ITEMS

The following items are reported to the Internal Revenue Service by ISU; and may be considered taxable. Taxable items are subject to withholding. ISU is required to deduct this withholding from the employee's paycheck during the month in which the reimbursement is made. All expenses must be appropriately documented with original receipts. Undocumented moving expenses, regardless of the type of expense, are considered taxable and subject to withholding.

Expense to be Reimbursed

Current IRS Regulation

- | | |
|-----------------------|-------------|
| • Interview Expenses | Not Taxable |
| • House Hunting Trips | Taxable |
| • Moving Expenses | Taxable |