

## Household Goods Moving Services – INSTRUCTIONS and EXCLUSIVE MOVER CONTACTS (SMU Agents)

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## 1 ----- OVERVIEW -----

### EXCLUSIVE PROVIDERS

Exclusive Providers are **mandatory sources** for Household Goods Moving Services for in compliance with SMU Policy 4.8. **Household Goods Moving Services** pertain to moving personal property, vehicles, and lab equipment.

SMU Exclusive Movers are full service **AGENTS** for National Carriers in the DFW area that have national and international agent offices. Exclusive Mover Agents are independent companies that coordinate moves directly with the **Origin Agent**. They conduct an in-home inventory survey (EITHER physical or virtual) to determine approximate weight of items to be moved, services needed and provide an estimate.

### TAXABLE INCOME

According to the 2017 Tax Reform Act, **all relocation expenses and lump sum payments are TAXABLE INCOME whether SMU pays on behalf of the employee or reimburses employee. SMU reports all moving expenses as taxable income through payroll with appropriate withholding taxes.**

### PEAK MOVING SEASON – MAY through SEPTEMBER

Move schedules are very tight during peak moving season and fill up fast. Moving companies recommend:

- Request estimates 3-6 weeks in advance of the expected move date when possible.
- **Reserve the move 30 days in advance of anticipated move date when possible.**

### E&I CONTRACT

SMU utilizes contracts through E&I Cooperative Services for moving and relocation services.

**CONTRACT BENEFITS:** 1) SMU receives pricing discounts and maximum liability coverage for loss or damage to items in a shipment. This **Full Value Protection** (with zero deductible) is based on a minimum of \$6 to \$7 per pound multiplied by the weight of the shipment and offered at no additional cost up to a maximum of \$120,000 to \$125,000. This formula serves only to reflect the overall fair value of a shipment; any loss/damage claim settlement would be assessed on the value of the individual relevant item. Additional coverage can be purchased from the moving company. 2) SMU Purchasing can intervene with the mover on employee's behalf.

### MOVING EXPENSE VERIFICATION AND REIMBURSEMENT FORM

The **Moving Expense Verification and Reimbursement Form** is required for all relocation moves and used for tax reporting purposes and reimbursement of **out-of-pocket moving expenses** (airfare, hotel charges, etc.). Obtain the form using this [link](#) on the Tax Compliance Office webpage.

### LUMP SUM PAYMENT – is TAXABLE INCOME

The moving allowance as provided in the offer letter can be received as a lump sum payment that is **TAXABLE INCOME and paid as extra compensation via payroll with appropriate withholding tax deductions.** Lump sum payments are usually paid on the first paycheck after the signed Moving Expense Verification form and appropriate receipts have been submitted to the Department/Division Contact (see below).

## 2 ----- EMPLOYEE RESPONSIBILITIES -----

1. Contact SMU AGENTS (listed on page 3) for household goods, vehicle and lab equipment moves.  
*\*\*\*DO NOT contact the National Carrier or another agent of the National Carrier\*\*\**
2. Obtain estimates from **one to four** of the SMU AGENTS as required by department. Getting at least two estimates is recommended so you have a price comparison before making a decision.
3. Discuss **Full Value Protection coverages** with the moving company contact to fully understand coverages. Request a cost estimate for **additional coverage** if desired or required.
4. **PACKING:** When new hire wishes the moving company to pack their personal belongings, the **origin agent** will arrange to have belongings packed. **\*NOTE:** packing cannot be done by moving company drivers.
5. **Department/Division Relocation Contact:** Person assigned in department and/or division to process relocation paperwork for new hire and enter purchase order as required for the move.
6. Ask your hiring manager for name and contact information of your Department/Division Relocation Contact or contact Cathy Heckman in SMU Purchasing.
7. Email estimates to the Department/Division Relocation Contact and state which SMU AGENT is preferred.
8. Estimates are non-binding estimates and not considered a bid, contract or guaranteed price.
9. Final moving charges are calculated on ACTUAL weight of items moved, mileage and services performed.
10. **DELIVERY OF GOODS:** When SMU is paying a specific amount toward Household Goods relocation expenses, the mover will typically collect the new hire's portion of the expense before goods will be delivered and charge to a preauthorized personal credit card.
11. Communicate, schedule/book move, and report damage or loss **directly with the SMU Agent that is handling the move.**
12. **Complete and submit the Moving Expense Verification and Reimbursement Form along with all out-of-pocket expense receipts to the department contact within 30 days after completion of the move.** Verify form amounts are correct and **do not exceed the move allowance as defined in the new employee offer letter or contract. Reimbursement approval is in accordance with the move allowance agreement.**
13. The **department/division contact** will attach original receipts to the **completed and signed** form to the Payroll Extra Comp e-form in Manager Self Service for any applicable amounts due the employee.
14. Out-of-pocket moving expense reimbursements are reimbursed **via EXTRA COMP as TAXABLE INCOME through payroll.**
15. **Reach out to the department/division contact should you have any questions regarding the reimbursement form or process.**

### 3 ----- DEPARTMENT/DIVISION RESPONSIBILITIES -----

1. Provide new hire RELOCATION INSTRUCTIONS document(s) with SMU AGENT contact information.
2. Determine and communicate to new hire the move allowance parameters for their relocation.
3. Department/Division Relocation Contact communicate to new hire that **all relocation expenses and lump sum payments are considered TAXABLE INCOME whether SMU pays on behalf of the employee or reimburses employee. SMU reports payment for all moving expenses as taxable income through payroll with appropriate withholding taxes.**
4. When using **EXCLUSIVE MOVERS**
  - a) Enter an eProcurement requisition to selected SMU AGENT no matter if SMU is paying for ALL or a PORTION of relocation expenses. (Purchase order (PO) will be emailed to the moving company, person who entered the epro req, Purchasing and SMU Controller.)
  - b) **PURCHASE ORDER REQUIREMENTS:**
    - When SMU pays ENTIRE AMOUNT, PO total will be the full estimate amount.
    - When SMU pays a **SPECIFIED AMOUNT** of the household goods moving expense the PO total will equal SMU Agent estimate or move allowance, whichever is lower.
    - **INCLUDE the following statements and information in the requisition. Requisition Comments and Attachments box:**
      - TOTAL MOVE ALLOWANCE as either 'specified amount' or 'entire amount of moving expenses'.
        - **Example:** TOTAL MOVE ALLOWANCE, \$5,000 for household goods relocation expenses
      - The moving company will bill SMU up to the move allowance amount and bill new hire for any remaining amount over move allowance.
      - Moving date specifics when provided in estimate.
        - pack date
        - load spread
        - delivery spread
5. Provide new employee information on how relocation payments and reimbursements are handled.
6. **Provide new employee with the Moving Expense Verification and Reimbursement Form. Inform them that the completed reimbursement form is due back no later than 30 days after completion of move.**
7. Department/Division Relocation Contact to **obtain from new employee the signed Moving Expense Verification and Reimbursement Form along with all out-of-pocket expense receipts no later than 30 days after completion of move.**
8. Department/Division Relocation Contact will review and verify form amounts are correct and **do not exceed the move allowance**, and that all **out-of-pocket expense receipts have been received from employee.**
9. Sign form and submit **ONLY ONE completed** Moving Expense Verification and Reimbursement Form with **all out-of-pocket expense receipts** for the entire move including all related costs subject to the total move allowance whether expenses are paid directly to a moving company or paid directly to the employee.
10. Attach original receipts for all amounts with **completed and signed** form to the Payroll Extra Comp e-form in Manager Self Service of my.smu for any applicable amounts due the employee.
11. Out-of-pocket moving expense reimbursements are reimbursed via EXTRA COMP as taxable income through payroll. Reimbursement is no longer made through Payment Requests or Accounts Payable.
12. Contact Tax Compliance (**214-768-4836**) with questions regarding the Moving Expense Verification and Reimbursement Form.
13. **Follow up with the new employee to offer assistance with the reimbursement process.**
14. **Contact Cathy Heckman in Purchasing with questions regarding the relocation process.**
15. A SMU credit card CANNOT BE USED to pay for the household goods moving company expenses.

#### 4 ----- **EXCLUSIVE MOVERS – SMU AGENT CONTACT INFORMATION** -----

##### **A-1 Freeman Moving Group - North American Agent (Sirva) \*\*\* SMU Supplier ID # 21097**

2242 Manana Drive, Dallas, Texas 75220

[www.a-1freeman.com](http://www.a-1freeman.com)

**Primary Contact: Mireya Ducot**

Email: [eandi@a-1freeman.com](mailto:eandi@a-1freeman.com)

972-506-1729 – E&I direct line

Alternate Contact: Jonathan Hightower

972-556-1777 – direct

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##### **Armstrong Relocation - United Van Lines Agent (Unigroup) \*\*\* SMU Supplier ID # 37**

1405 Crescent Drive, Carrollton, Texas 75006

<https://www.goarmstrong.com/>

**Primary Contact: Ken Williams**

972-389-5679 – direct

800-283-0511 – toll free

[kwilliams@GoArmstrong.com](mailto:kwilliams@GoArmstrong.com)

Alternate Contact: Ella Watson

901-479-2042 – direct

[ewatson@goarmstrong.com](mailto:ewatson@goarmstrong.com)

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##### **Berger Transfer & Storage - Allied Van Lines Agent (Sirva) \*\*\* SMU Supplier ID # 722**

14850 Grand River Road Fort Worth, Texas 75220

<https://www.bergerallied.com/>

**Primary Contact: Mark McIntyre**

[MarkM@bergerallied.com](mailto:MarkM@bergerallied.com)

214-802-5207 – cell

800-678-3980 – toll free

**Move Coordinator: Rosalyn Washington**

[rosalynw@bergerallied.com](mailto:rosalynw@bergerallied.com)

817-799-3013 – direct

800-678-3980 ext. 31-3013

## 5 ----- EXCLUSIVE MOVER SERVICES -----

### Standard Services include:

- Household moving
- International moving
- Top-rated drivers
- Packing, custom crating and unpacking
- Valuation Coverage/Insurance
- Vehicle transportation

### Additional Services may include:

- Lab relocation, frozen specimens & sensitive equipment
- Data center & technical equipment moving
- Office, library, and collection moves
- On-site storage solutions at destination facility

## 6 ----- NON-EXCLUSIVE MOVER REQUIREMENTS AND PROCESS -----

The University reimburses for moving expenses up to the agreed upon moving allowance.

SMU does not have contract agreements with non-exclusive movers. Employee must negotiate pricing and liability coverage with the non-exclusive moving company.

**Non-exclusive moving contracts/agreements are between the employee and moving company. SMU Purchasing cannot intervene on employee's behalf.**

**Moves contracted with non-exclusive moving companies must be paid with personal funds. A SMU CREDIT CARD CANNOT BE USED.**

Communicate, schedule/book move, and report damage or loss directly with the mover.

### TAXABLE INCOME

**According to the 2017 Tax Reform Act, all relocation expenses and lump sum payments are TAXABLE INCOME whether SMU pays on behalf of the employee or reimburses employee or pays employee as lump sum. SMU reports all moving expenses as taxable income through payroll with appropriate withholding taxes.**

**Department/Division Relocation Contact:** Person assigned in department and/or division to process relocation paperwork for new hire. Ask your hiring manager for name and contact information of your Department/Division Relocation Contact or contact Cathy Heckman in SMU Purchasing.

**Complete and submit the Moving Expense Verification and Reimbursement Form along with all out-of-pocket expense receipts to the department contact within 30 days after completion of the move. Verify form amounts are correct and do not exceed the move allowance as defined in the new employee offer letter or contract. Reimbursement approval is in accordance with the move allowance agreement.**

The **department/division contact** will attach original receipts to the **completed and signed** form to the Payroll Extra Comp e-form in Manager Self Service for any applicable amounts due the employee.

Out-of-pocket moving expense reimbursements are reimbursed **via EXTRA COMP as TAXABLE INCOME** through payroll.

**Reach out to the department/division contact should you have any questions regarding the reimbursement form or process.**