



Flight Attendant  
Transfer & Moving  
Policy:  
Satellite Bases  
2019

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## **Transfer and Relocation Program For Direct Reimbursement Employees Transferring at Company Request**

### **Introduction**

United is committed to helping you make a successful transition to your new assignment. Our Relocation Program has been designed with that objective in mind. United's Relocation Program does not cover every possible expense you may encounter, but it enables you to move to your new work location with minimum expense and inconvenience. Please keep in mind the following features of the program as you consider your move:

- Only a move from your old job location to your new job location will be covered by this policy. The IRS considers your job location to be the place where your work is centered, i.e., where you report to work or are otherwise required to "base" your work.
- Your shipment of household goods must be completed and in your new home within one year of your transfer effective date to qualify as a covered expense.
- The terms "homeowner" and "renter" as used in this booklet refer to your status with respect to your principal residence at your old job location. For example, if your job location changes from Chicago to Denver, your status will be based on your home in Chicago.
- The term "homeowner" refers to the owner of a single-family residence, co-op, condominium, townhouse or mobile home.

Please read this booklet carefully and discuss it with your family. Understanding the policy and how it works is key to making a smooth move. These benefits apply for one year from your effective date of transfer unless otherwise specified.

NuCompass Mobility will be your primary sources of information and assistance. Feel free to call them whenever you need any help with your relocation.

### **Maximum Cost Payable by United**

**The maximum total cost payable by United for your move shall not exceed two thousand five hundred dollars (\$2,500).** This includes all the assistance outlined in this booklet, excluding the NuCompass service fee and any applicable tax assistance ("gross-up"). Any move-related expenses that exceed this amount will be your responsibility. United wants to make sure you get the best value out of your relocation package. To assist you in achieving this within the \$2,500 cost cap, your NuCompass Relocation Consultant will advise you on strategies steps to manage your move most efficiently. Please note that it may be necessary therefore for NuCompass Mobility to delay or withhold reimbursement of expenses or modify delivery of certain services in order to manage to this maximum amount. You can speak with your Relocation Consultant in more detail about this.

### **A Note to Transferees Regarding This Booklet**

This booklet outlines basic policies and broad categories of expenses for which employees may claim reimbursement under Section 26 of the Joint Contract. It does not attempt to anticipate and address every situation and circumstance which may arise over time within a widely diversified workforce whose members may have vastly differing lifestyles and living arrangements.

In some instances, interpretation may be necessary. When a situation arises that you feel is not adequately addressed in the booklet, it is your responsibility to bring this to the attention of your

NuCompass Mobility Consultant for clarification or interpretation *before incurring an expense*. You must obtain approval prior to incurring any specific expense not described in this policy that you intend to submit for reimbursement; **United is not obligated to reimburse you for expenses you incur without prior approval.**

#### **ELIGIBILITY AND AUTHORIZATION FOR COMPANY- PAID MOVE**

To be eligible for a company-paid move, you must meet ALL of the following requirements:

- Change (transfer) bases from your current base to one of the new satellite bases in MCO, PHX or SAN within six months of the base opening **AND**
- Change the city of your primary residence (“primary residence” means your PeopleSoft Employee Profile permanent street address), **AND**
- Lease, rent or purchase a new residence in your name, **AND**
- Your new primary street address (not a Post Office box) must be located within a geographic area within 50 driving miles (determined by Google maps or similar service) of your new base airport location. **AND**
- Your move may not be between two points within the new base’s geographic area or within the same geographic area of your current residence.

**NOTE:** A flight attendant living in a commuter apartment in the new base location or who does not sell or rent her/his current primary residence will **not** be eligible for a company-paid move.

A flight attendant that accepts any transfer and moving benefits, e.g., house hunting, temporary living expenses, etc., has committed to relocate her/his primary residence to the geographic area designated by the Company. If you resign/retire from the employ of United Airlines, change your PeopleSoft address or relocate your primary residence outside this geographic area, (unless recalled to your former base) within one year of establishing your new primary residence, you will be required to reimburse the Company for the transfer and moving benefits paid to and for you.

If you qualify for a company-paid move, the cost to United shall not be greater than the cost to relocate you from (a) your current base or (b) your current primary residence -- whichever is less expensive -- to your new base.

If you have a Post Office Box as your current /PeopleSoft permanent address, you must provide documentation in your name to verify your primary address. For example, a fully executed lease or mortgage agreement, three consecutive months of utility bills and canceled checks tendered for their payment, tax return and driver’s license with that address.

Reimbursement for certain moving expenses is considered taxable income. United will “gross up” your income for the taxable items and pay the additional federal and FICA tax obligation resulting from these moving expenses for you at year-end. The tax gross-up provided by the Company is intended, *but is not guaranteed*, to account for the tax impact of taxable items. You may want to consider using qualified tax assistance for more information because you may have moving expenses for which you are not reimbursed and/or other tax liabilities.

You will have twelve months from the effective date of your transfer from your current base to complete your move and to pay and submit all expenses. If, during that period, you do not meet all the requirements for a company-paid move as outlined above, you will be required to reimburse United for all transfer and moving costs paid to and for you. **Note that if you use any of the above referenced relocation services, United will have to pay a service fee of**

**\$650 to NuCompass Mobility which will be included in any repayment amount if you do not complete your move as required.**

Final authority for interpretation of the relocation policy rests with Human Resources. Managers and supervisors of transferees who need assistance answering their employees' relocation questions should consult their NuCompass Mobility Consultant.

### **Initiating Your Move**

Once your transfer has been awarded, InFlight administration will determine your eligibility and, if qualified, provide your information to NuCompass Mobility.

The process will result in providing your contact information to NuCompass Mobility, who will assign a Consultant to you and contact you to start your move, including familiarization trip below.

### **Request Home Purchase Referral**

If you plan to purchase a home, assistance with area counseling and home-finding services at your new location is available through NuCompass Mobility. If you are interested, please contact your NuCompass Mobility Consultant for details. Services include:

- A personal counselor to assist you through the home purchase process;
- Information regarding housing availability and costs, commuting distance and alternatives, quality of schools and school districts, state/local taxes, climate, recreational opportunities as well as any additional information you may request; and
- Appointments with qualified real estate agents in your new location to provide you with an area orientation and assistance with house hunting and purchasing your new home.

### **Set Up a House Hunting Trip**

Prior to reporting to your new location, you may take a trip to familiarize yourself with your new job location and to look for a new home. This trip must be completed on your own time and not on company-paid time. United will reimburse all reasonable expenses with receipts for lodging, meals (not to exceed \$50 per day per person), car rental, tolls and parking, and the cost of babysitting for a three-day, two-night House hunting trip to your new location. In some locations, The use of your own car will be reimbursed at a rate of \$.58 per mile or at the current company business policy rate.

Rental cars and hotels can be booked in accordance with the United Business Travel policy available on Flying Together at: [https://ft.ual.com/-/media/UAL\\_Intranet/Documents/Procurement/Travel-Expense-Policies/Travel-Policy.pdf](https://ft.ual.com/-/media/UAL_Intranet/Documents/Procurement/Travel-Expense-Policies/Travel-Policy.pdf)

### **Reporting to Your New Assignment Travel to Your New Location**

You may fly or drive to your new location.

***If you drive to your new location***, United will reimburse you \$.58 per mile, or the current company business policy rate. You must take the most direct route. Contact your NuCompass Mobility Consultant if you have questions about determining the most direct route. You may drive and/or ship a combination of up to two vehicles from your old work location to your new work location. You may drive two, ship two or drive one and ship one.

If you and/or your family drive to your new location, United will reimburse mileage costs for up to two vehicles, providing no other vehicles are being shipped. Reasonable en-route expenses, such as meals [As of 5/13/2019, this is up to \$50 per day, per person—consistent with United's corporate travel policy] and reasonable and actual costs for lodging, will be reimbursed for one trip to your new job location. United will reimburse these expenses for each day that you drive an average of at least 400 miles. Divide the total distance by 400 to determine the days allowed. You should utilize regular days off to the best extent possible, to minimize time away from work. If your trip requires more than two days, you will be paid for those days. Make sure you reach an agreement with your new manager before you travel. If you ship two vehicles, you will not be eligible for en-route expenses.

***If you fly to your new location***, ask your manager to authorize one-way non-revenue on-line positive space travel (PS5B for you, your spouse or qualified domestic partner, and your eligible dependents. PS-5B positive space travel is restricted to United flights only. Positive space en-route travel is available only for you to report to work or for your and/or your family's final trip to your new location.

### **Temporary Living Expenses**

Once you have arrived at your new job location, United will reimburse reasonable temporary lodging, meals and laundry expenses (excluding dry cleaning), for you, **the employee, only**. While individuals should attempt to obtain, and remit, receipts for all meal expenditures, *receipts for any single payment of \$20 and over must be submitted*. Temporary lodging must be at a licensed hotel or corporate apartment to qualify for reimbursement. In some locations, Car rental, tolls and taxis, non-meal tips, long distance or cell phone charges, and meals while on a return trip are examples of expenses that are not covered and will not be reimbursed.

If you are currently a homeowner, temporary living expenses will be paid for up to 60 consecutive calendar days from the date you arrive at your new location. If you are currently a renter, expenses will be paid for up to 30 consecutive calendar days from the date you arrive at your new location. Regardless of your status, all reimbursements are subject to the total cost cap of \$2,500, which may not be enough to cover 60 days without incurring out-of-pocket expenses.

### **Reporting Weekly Expenses**

You should report your expenses weekly via the NuCompass CoPilot system and submit your receipts as directed by the website. Submit all necessary receipts through the NuCompass CoPilot system. Receipts are required for all expenses \$20 or above.

Expense receipts or documentation must be submitted within 30 days of when you incur the expense. **NOTE: Expense receipts submitted more than 30 days after the expense is incurred may not be paid.**

## **Moving to Your New Residence**

### **Moving Your Household Goods**

NuCompass Mobility will assign you a moving company when they receive your relocation file from HR. Your moving company will contact you to arrange for the shipment of your household goods. United's Relocation Policy only covers a move arranged by the Company and completed by United's designated moving company. Keep in mind that for many moves, the \$2,500 move cap will not be enough to completely pay for household goods move without you incurring out-of-pocket costs.

United *will pay* for the following services associated with moving normal household goods:

- Normal packing and necessary materials provided by the movers;
- Transportation of up to 25,000 lbs. of household goods to your new location;
- One extra pick up at point of origin *or* one extra delivery at destination, each within a 50-mile radius;
- Normal appliance services, including wiring and plumbing modifications at the point of connection required for disconnection and reconnection of your appliances;
- Storage at your destination for up to 60 days, if necessary;
- Warehouse handling;
- One warehouse access to household goods in storage if needed;
- Delivery to your new residence;
- Normal unpacking and removal of packing materials;
- TV antenna removal and installation (this does not include removal and installation in fringe areas where a special mast-type antenna or other special installations are used);
- Disassembly and re-assembly of cable TV service if moved from former residence;
- Disassembly and re-assembly of children's swing sets (not set in concrete); and
- Disassembly and re-assembly of a pool table.

United *will not pay* for the following services:

- U-Haul, self-move, or employee-contracted moving services—unless specifically approved in advance by the company with written cost estimates.
- Exclusive use of the moving van or expedited service;
- Partial delivery of household goods from the warehouse;
- Housecleaning or maid service at either your former location or new primary residence;
- Removal or installation of wall-to-wall carpeting, draperies and/or rods, waterbeds (unless drained and prepared for shipment), electrical fixtures, water softeners or similar items;
- Expenses for additional wiring or plumbing, removal or movement of any existing utility service, and replacement or repair of existing utility systems or appliances;
- Packing or transportation of boats, trailers, camping and utility trailers, motorcycles (United will, however, pay to ship a motorcycle in lieu of an automobile), jet skis, snowmobiles, lumber, bricks, cement, cordwood, airplanes or airplane parts, household pets (except via PetSafe, at the employee's cost), plants or any perishable items, or items which are not considered part of normal household goods or personal effects;
- Hobby/woodworking equipment or machine tools that are oversized and/or that require special moving services;
- Packing or transportation of automobiles included with your household goods;
- Waiting time, overtime, weekend or holiday service provided by the moving company;
- Disassembly or re-assembly of children's playhouses, portable swimming pools, hot tubs, utility sheds, fencing or items of a similar nature;
- Removal, replacement or repair of any portion of your fixed house; and
- Delivery to a point that is not your new job location.

## **Insurance of Your Household Goods**

United Airlines will provide, through its designated moving company, full replacement value insurance on your normal household goods. The amount of any insurance settlement is not to exceed \$7.00 per pound multiplied by your shipment weight up to a total of \$125,000. For example, the maximum insurance settlement for a shipment of 10,000 pounds cannot exceed \$70,000. Items of excess valuation such as artwork and antiques may require the purchase of additional valuation coverage. Coin or stamp collections, jewelry and currency are excluded from this insurance coverage. Please consult with your designated mover if you have any questions regarding insurance coverage.

### **Moving Estimates/Schedules**

The moving company will use a video-based survey tool to estimate the necessary packing materials and loading time for your move. Please advise the moving company of any unusual items you plan to move, fragile items requiring careful handling and items which will remain at the location.

You should try to arrange packing/loading/unloading/unpacking days with the moving company that best meet your schedule. United will not pay an additional cost for waiting time, overtime, weekend or holiday service. If it becomes necessary to change your move date, please advise the moving company at least 48 hours in advance to make arrangements for alternate dates.

### **Packing and Loading**

The moving company assumes full responsibility for all articles they pack and will not be responsible for damage to any items you pack, unless the damage is caused by their obvious negligence. The packing will be done professionally by the moving company, using new materials.

- Dangerous items such as flammable gases and liquids or perishable items such as plants or food should not be packed or shipped.
- Do not ship important documents, jewelry, money or other irreplaceable items.
- Do not pack your uniform, employee identification badges, or passport.
- You or your representative must be present when your household goods are loaded for shipment.

The moving van driver will take inventory of all items to be moved, accurately marking the contents of the boxes and noting the condition of your household goods. Sign and keep a copy of the inventory list. You will need the inventory list should you claim any damage or loss.

### **Delivery at Your New Home**

Upon delivery, the driver and moving crew will unload and unpack your household goods.

#### Helpful Tips for Safe Delivery of Household Goods:

- Check the goods delivered against the inventory list made by the moving van driver at the time of loading. It is your responsibility to account for all items listed, noting any damage or loss, and to verify that all items to be moved were loaded.
- It is to your advantage to have the moving crew unpack your household goods, as it places responsibility for safe delivery of fragile articles with the moving company. United will not pay for deferred unpacking. You should sign and date the moving company's form for only the actual and total amount unpacked, as United will be charged accordingly. Do not sign a blank form.
- The moving crew should remove packing materials that you do not want to keep. United will not pay for deferred removal of packing materials.
- You and the moving van driver should check for any property damage that may have occurred to your primary residence after your household goods were unloaded from the moving van, and record any damage on the inventory list.



- If you have your goods in storage, you should advise the moving company at least two weeks in advance of the date that you want your stored goods delivered. This will help to ensure your desired delivery date is met.

### **Reporting Damaged or Lost Goods**

If there are any damaged or missing household items follow these steps:

1. Inform the driver that the loss or damage did occur.
2. The moving van driver must note any damage or loss on the inventory list.
3. Keep a copy of the inventory list, noting the missing items or type of damage and the item number(s) affected. You and the driver should both sign and date the inventory list.
4. Request Proof of Loss and Damage forms immediately from the moving company at your destination.
5. Complete the Proof of Loss and Damage forms and return them to the moving company, indicating the item numbers of the missing or damaged articles and the extent of the damage. Do not send your copy of the inventory list.

### **COMAT Shipment of Personal Effects**

You may request one shipment (up to 750 pounds) of personal effects as space available Company material (COMAT) on Company aircraft. Please contact the cargo office at 1-800-822-2746 to inquire about the COMAT process. Split shipments are not allowed.

Personal effects being shipped COMAT must be:

- Properly and securely packed,
- Clearly labeled with your new Company address, and
- Delivered to your nearest air freight office.

Your shipment is subject to the same packing, size, and weight restrictions as all other air freight. Valuable, perishable, or time-critical items should not be sent COMAT. For safety reasons, dangerous goods may not be packed along with household items as part of the COMAT authorization when moving. Restricted articles include, but are not limited to: acids, matches, lighter fluid, paints, flammable solids such as flares, flammable liquids such as paint and lacquer thinners, corrosive materials such as wet cell batteries, explosives such as fireworks or black powder, compressed gases, fire extinguishers, poisons and irritating or incapacitating sprays. Firearms can be sent COMAT provided they are unloaded and declared. Call your air freight office if you have any questions.

Your COMAT shipment is not automatically covered by Company insurance and any loss and/or damage claims will not be processed. You may be able to purchase insurance at the air freight office prior to your shipment.

### **Storage**

If needed, United will authorize up to 60 days of storage provided by your designated household goods mover at your new job location. Advise your mover at least 15 days before you want your stored goods removed.

### **Moving Your Automobile**

United will provide shipment for up to two automobiles to your new location provided that the distance exceeds 500 miles. Let your Relocation Consultant know if you would like to ship one or two cars (maximum). If you ship the two-car maximum, you are not entitled to any further shipment or driving reimbursement for any additional automobiles you may presently own. However, if you ship only one vehicle, you are entitled to the mileage reimbursement for one additional vehicle, providing you drive it to the new job location. One motorcycle may be shipped with your household goods in lieu of the shipment of one automobile. Automobiles must be street-legal, operating and registered to be eligible for shipment.

You or your representative must be available to take delivery of your car upon its arrival. United will not pay for automobile storage.

Your cars will be shipped separately by an auto carrier and not with your household goods. To prepare the car for shipment, remove all personal belongings. When your car is delivered you will be asked to sign a Delivery Receipt. Before signing the Delivery Receipt, you should inspect your car and note any damage.

### **Transporting Your Pets**

You can also ship your household pets, in an approved kennel, via the PetSafe™ service which may be offered at employee discounted rates. Health certification and rabies tags, if required, should be documented before shipping your pets. Necessary health certification, rabies tags and any other costs incurred in transporting your pet(s) are not reimbursable.

During certain periods of the year, and at certain locations, United may embargo the shipment of pets on Company aircraft. In these situations, you should work with your supervisor to arrange alternate transportation of your pets. If suitable arrangements cannot be made, it will be your responsibility to secure transportation of your pets. In some cases, driving en-route to your new location may be the only way to ensure the safe and timely transportation of your pets. For additional information regarding the shipment of pets, please contact a PetSafe representative.

### **Income Tax Liability**

Reimbursement for many moving expenses is considered taxable income. The Company is required to report these expenses to the IRS as income to you. Some reimbursements, however, are deductible or excluded from your income. For those payments that are not deductible or excluded, United will "gross up" your income (i.e., pay the federal and FICA tax obligations for you). "Gross-up" calculations will be determined by using your United income only and will not reflect income from outside sources. Your "gross-up" payment is meant to offset your federal tax liability based on your United income and does not necessarily preclude any personal federal tax liability resulting from your company-paid moving expenses. The Company does not gross-up your income for state income tax obligations.

### **POLICY INTERPRETATION**

This Policy is meant as an outline of your relocation benefits. It should be assumed that services not expressly stated in this document are not provided by the company. Please study this policy carefully and consult with your Relocation Consultant should you have questions regarding your particular situation. You must obtain *approval prior to incurring* any specific expense not described in this policy that you intend to submit for reimbursement; **United is not obligated to reimburse you for expenses you incur without prior approval**. Ultimately, WHQHR/WHQLR will determine the interpretation of the policy and will obtain appropriate approval for exceptions. Employees who receive benefits in contradiction to the policy are expected to reimburse the company for the assistance received in error.