 **Moving and Relocation Checklist**

**General Information**

Keep track of all expenses related to your move.

An employee and spouse or domestic partner may be reimbursed for one house-hunting trip (round trip from former residence to campus) in addition to relocation travel expenses. No expenses related to other dependents or animals are allowable.

● Relocation travel expenses is defined as a one-way trip from the former residence to the general area of the new campus or primary job location.

● Members of your household do not need to travel together to Bakersfield. However, only one one-way relocation trip per person and the cost of moving one vehicle will be reimbursed.

Mileage is reimbursed for the shortest, most direct route from the former residence to the Bakersfield area using [**Google Maps**](https://www.google.com/maps).

● If during your trip to your new home you make a stopover or take side trips, the expenses and mileage for the extra miles traveled will not be reimbursed.

Actual lodging, meals and incidentals will be reimbursed for every 24-hour period ***up to***these limits:

|  |  |
| --- | --- |
| Lodging | $275.00 limit per night, excluding taxes**\*** |
| Meals | $55.00 limit per person, per day |
| Incidentals | $7.00 limit per person, per day |

● The maximum tip allowable by the CSU is 20%.

● This reimbursement ends upon arrival in the Bakersfield area.

**\***The CSU lodging limit is $275.00 per night excluding tax, but we do reimburse the taxes paid.

All expenses must be ordinary, reasonable, not extravagant, necessary, and allowable. (If you want to verify if an expense that isn’t included here is allowable, contact Payment Services.)

**Examples of allowable expenses (not a complete list):**

● Boxes and packing material

● Penalty for breaking a lease early

● Mileage using the most direct route

● Rental moving truck & gasoline

● Moving company

● Labor hired to load and unload household goods

● Lodging en route to Bakersfield

● Storage unit (up to 60 days)

**Examples of unallowable expenses (not a complete list):**

● Storage units after 60 days ● Tips over 20%

● Alcohol ● Lodging after arrival in Bakersfield

● Meals after arrival in Bakersfield ● Mileage after arrival in Bakersfield

**Required Backup for a Moving and Relocation Claim**

Original, **detailed** receipts for all expenses $25.00 and over.

● All receipts must have the vendor name and contact information printed on them.

● At restaurants, travelers should request to keep the detailed receipt of what was ordered.

◦ If a detailed receipt isn’t received, the traveler must verify that no alcohol was purchased by writing “no alcohol” on the receipt and signing it.

● Receipts should include the method of payment (including last 4 digits of any credit card used).

Acceptable documents from moving companies are:

● **Detailed invoices** with the company/individual’s name and contact information and showing a **zero-balance due**, or

● Receipts showing payment in full.

**Taxation**

Per [IRS Publication 521](https://www.irs.gov/publications/p521), moving and relocation expenses are subject to Federal Income Tax and will be reported to the State Controller’s Office for inclusion on the employee’s W-2 for the calendar year the employee was reimbursed for the expense(s).

**Policies and Procedures**

This checklist is meant to be an aid and is not a complete list of procedures to be followed. Reimbursement will be paid based on the following documents located at <https://www.csub.edu/bas/paymentservices/Policies/index.html>.

* [HR Policy 2018-07](https://www.csub.edu/bas/paymentservices/_files/csu_hr_technical_letter.pdf)
* [CSUB Moving and Relocation Policy](http://www.csub.edu/bas/paymentservices/_files/moving_and_relocation_policy.pdf)
* The travel portion of the relocation follows the [CSUB Travel Procedures](http://www.csub.edu/bas/paymentservices/_files/travel_policy.ddtx).

**\*\*\***If an employee whose moving and relocation expenses have been reimbursed does not continue employment withCSUB for a period of at least two years (unless discontinuance of employment was the result of death, disability or other similar unexpected cause beyond the control of the employee as determined by the employer), the employee shall repay CSUB the following percentage of the amount received for reimbursement for such moving and relocation expenses (including if the employee transfers to another CSU):

|  |  |
| --- | --- |
| **Duration of CSUB Employment** | **Repayment Percentage Due** |
| Less than 6 months | 100% |
| At least 6 months but less than 12 months | 75% |
| At least 12 months but less than 18 months | 50% |
| At least 18 months but less than 24 months | 25% |

**Questions?**

If you have any questions about moving and relocation, please contact:

1. The administrative contact provided by your hiring department.
2. Payment Services. Note: we can help with questions about what is and isn’t reimbursable but will not know any details of your offer.
   * Primary relocation specialist, Sally Shaff: [sshaff@csub.edu](mailto:sshaff@csub.edu), 661-654-6207
   * Payment Services group email: [accounts\_payable@csub.edu](mailto:accounts_payable@csub.edu)