**Moving and Relocation Checklist** 

**General Information**

Keep track of all expenses related to your move.

An employee and spouse or registered domestic partner may be reimbursed for one house-hunting trip (round trip from former residence to campus) in addition to relocation travel expenses.

● 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 up to two vehicles will be reimbursed.

Mileage is reimbursed for the shortest, most direct route from the former residence to the Bakersfield area using **Google 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.

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 for up to two vehicles using the most direct route

● Rental moving truck & gasoline

● Moving company

● Labor hired to load and unload household goods

● Lodging

● Storage unit (up to 60 days)

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

● Lodging after arrival in Bakersfield (with extremely limited exceptions, which must be **pre-approved in writing** by the appropriate Vice President.)

● Meals after arrival in Bakersfield

● Any mileage after arrival in Bakersfield

● Storage unit costs after 60 days

● Alcohol

● Tips over 20%

**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 incurred on or after 1/1/2018 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 expense was incurred.

**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:

* [HR Policy 2018-07](http://www.csub.edu/bas/fiscal/studaccount/_files/csu_hr2018-07.pdf)
* [The CSUB Moving and Relocation Policy](http://www.csub.edu/bas/fiscal/studaccount/_files/moving_and_relocation_policy.pdf)
* The travel portion of the relocation follows the [CSUB Travel Policy and Procedures](http://www.csub.edu/bas/fiscal/studaccount/Payment%20Services%20/Policies/index.html).

**Questions?**

If you have any questions about moving and relocation after reading the material listed, please contact:

* The administrative contact provided by your hiring department.
* Payment Services:
  + Primary relocation specialist, Sally Shaff: [sshaff@csub.edu](mailto:sshaff@csub.edu), 661-654-6207. Provide her with your questions and she should respond within 24 hours.
  + Secondary relocation specialist, Felisitas Alvarado: [falvarado3@csub.edu](mailto:falvarado3@csub.edu), 661-654-2535.
  + Payment Services manager, Becky Lappin [blappin@csub.edu](mailto:blappin@csub.edu), 661-654-2531.