

## Moving & Relocation Guidelines

The University is authorized, depending on the availability of funds, and other considerations, to assist in paying a portion of moving and relocation costs for new faculty or staff that change their residence in order to accept employment at Cal Poly. Moving and relocation expenses are not provided to individuals that will be employed by the University for a period of less than 2 years. The University's appointment letter indicates the maximum dollar amount which the University will pay towards an employee's moving and relocation expenses. Moving and relocation expenses that do not conform to these guidelines will not be reimbursed.

### Moving and Relocation Reimbursement

The University preference is to reimburse the employee for moving expenses. If a purchase order must be issued to a moving company, Contracts and Procurement Services must receive **prior authorization** from the college and/or department. Reimbursement for moving expenses should be submitted on a Travel Claim Form (form 262) <http://afd.calpoly.edu/fiscalservices/forms.asp> and supported with receipts and proof of payment. The newly hired employee's department can assist with this process. Moving and relocation guidelines are as follows, please see technical letter [HR 2012-02](#) for more detailed information:

#### Moving Expenses

Moving expenses may be reimbursed for an employee who relocates to accept employment with Cal Poly. It is essential to keep all original receipts for expenditures in order to support your claim for reimbursement. Allowable moving expenses include the cost of packing, insurance, transportation, storage in transit (not to exceed 60 calendar days), and unpacking and installation of the employee's household goods at the new residence. Moving and relocation expenses apply only to the employee and in some cases to the spouse or domestic partner. The sum of all moving and relocation expenses cannot exceed the moving and relocation amount in the employee's offer letter.

#### Mileage

Mileage reimbursement for moving and relocation is limited to a one-way mileage for a single vehicle at the current mileage reimbursement rate. Mileage reimbursement will be for the most direct route from the former residence to the San Luis Obispo area.

#### Relocation

Relocation reimbursement is allowed for lodging expenses supported by actual receipts and for meals and incidentals in accordance with the CSU Travel Policy. This allowance will not be paid for more than sixty (60) days and will terminate immediately upon establishment of a permanent residence by the employee. The sum of all moving and relocation expenses, including allowances, cannot exceed the moving and relocation amount in the employee's offer letter.

#### Substantiation of Expenses:

All expenses submitted for reimbursement must be supported by itemized receipts or invoices.

### What are my moving and relocation options?

- 1) Employee enters into a personal contract with a moving company of their choice, pays for the move, and submits moving expenses incurred for reimbursement once move is complete. Expenses incurred must be reasonable, substantiated by itemized receipts and service costs submitted should be from a professional moving company.
- 2) Cal Poly contracts with the moving company on the employee's behalf:

- a) Obtain a minimum of two written quotations or estimates from a CSU negotiated professional moving company and identify the lowest cost option.
- b) Forward the quotations to your hiring department
- c) Hiring department prepares a purchase requisition
- d) Contracts & Procurement Services will issue a Purchase Order (PO) or a Letter of Authorization to the moving company with the lowest price.
- e) After the PO is issued to the carrier selected, you will sign the authorization for shipment of goods.
- f) Cal Poly will pay the invoice that the carrier submits net 30 days after the actual move upon receipt of an invoice approved by the hiring department.

**CSU negotiated professional moving contracts available to a new employee:**

<http://www.calstate.edu/CSP/contracted-movers.shtml>

**Recovery of Reimbursement:**

If an employee whose moving or relocation expenses has been reimbursed does not continue employment with the CSU for a period of at least two years (unless discontinuance of the employment was the result of death, disability or other similar unexpected cause beyond the control of the employee as determined by the appointing authority), the employee shall repay the following percentage of the amount received for reimbursement for such moving and relocation expenses:

- (a) 100% if employed less than 6 months.
- (b) 75% if employed at least 6 months but less than 12 months.
- (c) 50% if employed at least 12 months but less than 18 months.
- (d) 25% if employed at least 18 months but less than 24 months.

**Tax Information Changes to Moving and Relocation Expenses:**

Most moving and relocation expense reimbursements are considered taxable income to the employee. For more information on taxability of moving expenses see technical letter [HR/Benefits 2010-15](#)

**CSU TRAVEL POLICY:**

<http://www.calstate.edu/icsuam/sections/3000/3601.01.shtml>

For questions regarding moving and relocation and the CSU travel policy, please contact:

Payment Services  
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