

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 must conform to CSU guidelines as stated in Technical Letters [HR/Benefits 2018-10](#) and [HR/Benefits 2018-07](#) , and 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 Expense Reimbursement Approvals

The hiring department must obtain approval for moving and relocation expenses prior to extending an employment offer. Moving and relocation expenses for staff and management employees must be pre-approved by Human Resources and moving and relocation expenses for faculty must be pre-approved by Academic Personnel. Moving and relocation expenses require the following level(s) of approving officials:

Dollar amount of Moving & Relocation Expense Reimbursement	Approving Official
Less than \$10,000	Dean or Department Head
\$10,000 or Greater	Vice President and President

The offer letter shall not exceed the approved Authorized Amount.

Moving and Relocation Expense Reimbursement

The University preference is to reimburse the employee for moving expenses incurred. However, if the new employee chooses to do so, the University may contract with a moving company on behalf of the new employee. If so, the employee shall follow the second option in the Moving and Relocation Vendor Options below.

All expenses must be itemized on the [Moving and Relocation Claim Form](#), including expenses paid directly by the employee and expenses paid directly by the University on behalf of the employee. Itemized receipts to substantiate services provided and proof of payment must be submitted with the claim form. Below is a list of all paperwork to submit to receive your reimbursement. The newly hired employee's department can assist with this process.

- Copy of offer letter
- Signed Moving and Relocation Acknowledgement page (attached to this guideline)
- Signed Moving and Relocation Claim Form
- Appropriate receipts for allowable moving and relocation expenses

Moving Expenses

Allowable moving expenses include the cost of packing, insurance, travel ahead of move to house hunt or scout lodging options, 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 Authorized Amount in the employee's offer letter.

Mileage

Mileage reimbursement for moving and relocation is limited to one-way mileage for a single vehicle at the current moving mileage reimbursement rate (18 cents per mile for 2018). 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](#). Lodging expense reimbursements shall not exceed sixty (60) days and will terminate immediately upon establishment of a permanent residence by the employee. The sum of all moving and relocation expenses, cannot exceed the moving and relocation Authorized Amount in the employee's offer letter. Any exceptions to this sixty (60) days term requires Vice President approval prior to submitting the Moving and Relocation Claim Form.

Substantiation of Expenses:

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

Taxability of Expenses:

All moving and relocation expense reimbursements are considered taxable income to the employee. The reimbursement amount issued to the employee will be treated as income for payroll tax purposes and payroll taxes will be deducted from the employee's paycheck.

Moving and Relocation Vendor Options

Employees have the following options to contract with moving vendors:

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. The sum of all moving and relocation expenses cannot exceed the moving and relocation Authorized Amount in the employee's offer letter.

OR

2. Cal Poly contracts with the moving company on the employee's behalf:
 - a. Employee shall obtain a minimum of two written quotations or estimates from a CSU negotiated professional moving company and identify the lowest cost option
 - b. Employee shall forward the quotations to the hiring department
 - c. Hiring department prepares a purchase requisition
 - d. Procure to Pay 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, employee signs the authorization for shipment of goods
 - f. Cal Poly will pay the invoice that the carrier submits after the actual move upon receipt of an invoice approved by the hiring department.
 - g. The sum of all moving and relocation expenses cannot exceed the moving and relocation Authorized Amount in the employee's offer letter.

CSU Negotiated Professional Moving Contracts Available to a New Employee

Please click on the following link for a list of CSU negotiated professional moving vendors:

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

Cal Poly Recovery of Reimbursement:

If an employee, whose moving or relocation expenses have 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

Please contact the following for questions regarding:

Taxes:

Cal Poly Payroll

Email: payroll-services@calpoly.edu

Phone: 805-756-2605

This guideline or CSU travel policy:

Cal Poly Payment Services:

Email: sbs-payment@calpoly.edu

Phone: 805-756-5871

Cal Poly Moving and Relocation Acknowledgement

Please read and acknowledge by initialing each of the following:

_____ I have read and complied with the CSU Travel Policy

_____ I have read and complied with the Cal Poly Moving and Relocation Guidelines

_____ I understand I must include ALL moving and relocation expenses on my moving and relocation claim, including expenses that Cal Poly paid the vendor directly. I have entered a “Y” in Cal Poly Direct Pay column on expense report to indicate the Cal Poly directly paid expenses.

_____ I understand that ALL moving and relocation expenses claimed are taxable, regardless if Cal Poly paid the vendor directly or I paid them directly.

_____ I understand the TOTAL claim amount will be reported to Cal Poly Payroll so the appropriate taxes may be paid out (taken out) of my paycheck.

_____ I understand if I leave Cal Poly’s employment before 2 years I will be required to repay up to the entire amount of the reimbursement received for my moving and relocation.

_____ **I understand to receive my reimbursement for my moving and relocation expenses I must submit the following along with my moving and relocation claim:**

- Copy of offer letter
- Signed Moving and Relocation Acknowledgement page
- Signed Moving and Relocation Claim Form
- Appropriate receipts for allowable moving and relocation expenses