



MOVING AND RELOCATON PROCEDURES

08/01/18

This document covers moving and relocation policies and procedures, including tax reporting and withholding requirements applicable to employees of California State University, Long Beach.

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I. RELOCATION ALLOCATION

Your appointment letter contains your moving and relocation allocation. This amount INCLUDES your house hunting trip and allowable reimbursable expenses of your actual move. You will not be reimbursed for expenses in excess of this allocation.

II. POLICY GOVERNING RELOCATION EXPENSE REIMBURSEMENT

The Office of the Chancellor sets CSU internal procedures governing moving and relocation expense reimbursement. Attachment A of the CSU Relocation policy provides the details of these internal procedures. [Updated Moving and Relocation Policy HR-2018-07](#)

III. FACULTY AND STAFF MOVING COORDINATORS & OTHER UNIVERSITY CONTACTS

Faculty Moving Coordinator:

Kiry Meng

Phone (562) 985-5971

E-Mail kiry.meng@csulb.edu

Staff Housing & Relocation Coordinator:

Beth Anderson

Phone (562) 985-2473

E-Mail emp-housing@csulb.edu

In addition, the University has a specialized Faculty and Staff Housing and Relocation Assistant Resource Center that can assist you with housing information. Please visit the website at: <http://daf.csulb.edu/employees/housing/>

Reimbursement for moving and relocation expenses is handled by the Accounts Payable Office. Please direct questions regarding the reimbursement process to:

Carol Monson

Accounts Payable Manager

Phone (562) 985-8301

E-Mail carol.monson@csulb.edu

Tammy Connors

Accounts Payable Supervisor

Phone (562) 985-2697

E-Mail tammy.connors@csulb.edu

IV. HOUSE HUNTING TRIP

If you are planning to make a house hunting trip, please note that the cost of that **one trip** is included in your allocation. The University will reimburse you and your spouse/domestic partner for the following expenses: airfare, rental car, airport parking and/or shuttles, lodging, and meals. However, the University will not reimburse the cost of a house hunting agency or service. Please refer to Section II for specific reimbursement information.

A. Maximum Meal Reimbursement

Meal reimbursements are in accordance with [Appendix C of CSULB Travel Policy](#). Authorized amounts are actual meal expenses up to \$55/day and \$7/day incidentals allowance. Expenses should be reported as actual amounts incurred.

Receipts - Each college may have its own internal requirements regarding turning in receipts for reimbursement for business related travel claims; however, for moving and relocation expenses, Academic Affairs requires that **all receipts must** be submitted in order to be reimbursed including shuttles, taxis, parking, and meals. It is recommended that a credit card be used to pay for your house hunting trip to track expenses.

B. Local Hotels

For your convenience, the following are names of hotels with CSULB rates. However, you may stay at any hotel of your choice. Receipts are required for lodging reimbursement.

Ayres Hotel Seal Beach (4 miles from campus)

<http://www.ayreshotels.com/sealbeach/>

(800) 653-3230

12850 Seal Beach Blvd. Seal Beach, CA 90740

Hotel CURRENT (1 mile from campus)

<http://www.hotelcurrent.com/>

(800) 990-9991

5325 E. Pacific Coast Highway

Long Beach, 90804

Holiday Inn (by the Long Beach Airport)

www.holidayinn.com

(866) 375-9947 for reservations.

2640 Lakewood Blvd. Long Beach, CA90815

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Marriott Hotel (by the Long Beach Airport)

www.marriott.com

(562) 425-5210

4700 Airport Plaza Drive

Long Beach, CA 90815

Hilton Long Beach (downtown Long Beach)

(562) 982-3419 (contact Faculty Moving Coordinator for the campus corporate number)

701 West Ocean Blvd.

Long Beach, CA 90831

V. RELOCATION

Household effects include items such as furniture, clothing, musical instruments, household appliances, foods, and other items that are usual and necessary for the maintenance of a household. Household effects **shall not** include the following: 1) more than one automobile, 2) other motor vehicles, 3) farm tractors, implements, and equipment, 4) trailers with or without other property, 5) boats, 6) all animals, livestock or pets, 7) belongings that are not the property of the immediate family of the employee, 8) firewood, 9) fuel, 10) brick, sand, ceramic wall tile, wire fence or other building materials.

Moving of household effects includes the necessary expenses incurred for packing, insurance, transportation, storage in transit (not including warehouse handling charges except when required by interstate tariffs), unpacking, and installation of the employee's household effects at the new location.

A. Commercial Carrier

When movement of household effects is made by a contracted commercial carrier, the University will pay the carrier directly.

[Contracted Commercial Carrier](#) – The CSU has negotiated with several commercial carriers to allow discounted rates for its employees and prospective employees. If you select a commercial carrier that is under contract with the California State University System, you will need to obtain an estimate from the commercial carrier for the University to issue a Purchase Order directly to the carrier. Please note that the University will only issue a Purchase Order up to the amount of your allocation.

Example: If you are allocated a \$5,000 moving and relocation allowance and the estimated carrier cost is \$5,700, a Purchase Order will be issued only for \$5,000. You will need to work directly with the carrier to pay the \$700 difference since the total estimate cost exceeded your moving and relocation allowance.

Contact your Moving Coordinator or immediate supervisor for assistance in facilitating the necessary CSULB Purchase Order so the University can pay the contracted mover directly. It is common for movers to contact the University directly or forward estimates; however, the University will not contract or issue a Purchase Order for your move until **you** notify us that you have selected a company and accepted their estimate to move your household effects.

Most moving companies contracted with the University carry limited liability insurance based on the weight of your goods; however, that value may not be equivalent to the goods' total replacement cost. Likewise, certain items, such as fine art or your automobile may be expressly excluded from coverage. The insurance coverage and its exclusions vary from agreement to agreement. You are responsible to assess the value of your property and to request additional insurance, if needed. In order to do so, you should review the applicable CSU moving contract, found at: <http://www.calstate.edu/csp/contracted-movers.shtml>. You must inquire with the moving company about obtaining additional insurance. If unavailable through the contracted insurance company, you may obtain additional insurance through a third party. The cost to purchase insurance to cover the full value of your goods per the approved move can be reimbursed as part of your approved moving and relocation allocation.

Non Contracted Commercial Carrier – Please note that if you select a non-contracted carrier the University will not pay a non-contracted carrier directly. You will be responsible for paying the non-contracted carrier and the University will reimburse you upon receipt of a properly approved Moving and Relocation Expense Claim and original paid invoices, within your relocation allocation. To make an informed decision when selecting your mover, feel free to check these websites:

Better Business Bureau www.bbb.com

Moving Scams www.movingscam.com

B. Moving Your Office

If you choose to mail or ship your office directly to your department office at CSULB, the University will reimburse the cost, within your allocated allowance. You must notify your Department Chair/Faculty Moving Coordinator prior to shipping.

C. Shipping of Personal Motor Vehicle

If you choose to ship your vehicle, you will need to enter into a separate contract with a commercial carrier. None of the CSU commercial carrier agreements covers vehicles. You will be responsible for paying the commercial carrier and the University will reimburse you, for **one** vehicle only, upon receipt of a properly approved Moving and Relocation Expense Claim and original paid invoices, within your approved allocation.

D. Transportation to New Residence

Reimbursement will be made for only one method of transportation to your new residence. If you elect to use your privately owned vehicle, the total cost of mileage (according to the current federal standard mileage rate for moving expenses or at rates approved by the Chancellor), meals, lodging, and incidentals should not exceed the cost of using a comparable and reasonable public transportation method.

1. Public Transportation Method

The University may reimburse you and your spouse or domestic partner for the cost of a **one-way fare** from your former residence to CSULB when public transportation is used, such as coach airfare or ground transportation. The University will not reimburse the cost of travel for children, dependents, and/or pets.

2. Privately Owned Motor Vehicle

If you elect to travel by privately owned motor vehicle (your personal vehicle), the University may reimburse you, within your allowance, for the following related expenses:

- a. Mileage, for one vehicle only, is reimbursable up to the current Federal standard mileage rate for moving expenses or at rates approved by the Chancellor. Please refer to [Appendix B of CSULB Travel Policy](#) for the current reimbursement rate. Mileage will only be reimbursed for a fairly direct route.
- b. The University may reimburse you and your spouse or domestic partner for the cost of meals, lodging, and other incidental expenses if traveling by a privately owned motor vehicle. Meal reimbursements are based upon actual expenses not to exceed the maximum allowances indicated in Section IV - House Hunting Trip. Reimbursement for lodging is based on the actual cost supported by a receipt, up to the maximum allowance approved by the Chancellor.

VI. LODGING AND SUBSISTENCE ALLOWANCE

When approved in advance, the University may reimburse you, your spouse or domestic partner for temporary living expenses until a permanent residence is established.

Example: The moving truck picks up your household effects on Tuesday and you fly to Long Beach that night, but your furniture and apartment will not be ready until next Tuesday. The University will pay for the expenses, up to your relocation allocation, until your belongings arrive and your new residence is ready.

Meal reimbursements are based upon actual expenses not to exceed the maximum allowances indicated in Section IV - House Hunting Trip. Reimbursement for lodging is based on the actual cost supported by an itemized receipt, up to the maximum allowance approved by the Chancellor.

VII. REIMBURSEMENT PROCEDURE

If you choose to have your household goods moved by a contracted commercial carrier, the University will pay the moving company directly. Otherwise, if you elect to move yourself, mail or deliver original receipts, as noted below. An employee and spouse or domestic partner may be reimbursed for actual lodging expenses, supported by an itemized receipt, plus meal and incidental expenses in accordance with [Appendix C of CSULB Travel Policy](#).

New Faculty: Mail or submit original paid receipts to your Moving Coordinator. The Moving Coordinator will review the receipts and complete the necessary forms for reimbursement. New Staff: Please complete the Moving and Relocation Expense Claim. Attach your original paid invoices and submit these to your hiring department for approval. Your Housing & Relocation Coordinator can assist you with this process.

Once the Moving and Relocation Expense Claim is signed and approved, it should take approximately 15 business days to receive reimbursement.

Note: Receipts need to be submitted within 60 days of the completion of the travel.

VIII. MOVING EXPENSES AND RELOCATION ALLOWANCE CRITERIA

In order to qualify for reimbursement under most circumstances, the new primary job location must be at least 50 miles farther from the employee's former home than the old primary job location.

Example: The employee's normal commute distance from former employment to former residence was 15 miles. The employee's normal commute to or from CSULB to the employee's former residence must be a minimum of 65 miles to qualify for reimbursements.

IX. EXPENSES SUBJECT TO INCOME TAX WITHHOLDING

Under the Tax Cuts and Jobs Act of 2017, the personal deduction for relocation expenses and the exclusion from income of employer-paid relocation expenses are suspended from January 1, 2018 through December 31, 2025. As a result, all moving expenses incurred on or after January 1, 2018, whether reimbursed to an individual or paid to a vendor on behalf of an individual, are taxable income to the individual.

X. REPAYMENT OF MOVING EXPENSES REIMBURSED BY THE UNIVERSITY

If you do not wish to continue your employment with CSULB for reasons other than involuntary separation, disability, or death, you are required to repay the University for all moving and relocation expenses as follows:

- 100% if employed less than 6 months
- 75% if employed at least 6 months but less than 12 months
- 50% if employed at least 12 months but less than 18 months
- 25% if employed at least 18 months but less than 24 months.

Please make sure you keep a proof of the repayment (deposit receipt, copy of the check, etc.), which you may need for your tax return.

XI. FREQUENTLY ASKED QUESTIONS (by Category)

LODGING

Q: How many days can I stay in a hotel for house hunting/relocation?

A (1): Relocation: Please consult your moving coordinator.

A (2): House hunting: You have a maximum of seven (7) days for house hunting and only one house hunting trip is allowed.

Q: What kind of hotel receipt should I submit?

A: The hotel bill should be itemized showing the room rate and taxes, method of payment, and a zero balance.

Q: What are unallowable charges while lodging?

A: Extra fees for pets, movie charges, and other miscellaneous charges may be determined

as unallowable expenses.

TRAVEL MEAL REIMBURSEMENTS

Q: I am traveling with my spouse/domestic partner; can he/she also receive meal reimbursement?

A: Yes, the meal reimbursement would be allowed for both you and your spouse/domestic partner up to the maximum meal reimbursement amounts specified in Section IV.

Q: Can my children receive meal reimbursements?

A: No.

Q: Is alcohol a reimbursable expense?

A: No.

TRANSPORTATION

Air Travel

Q: Will the university pay for my child(ren)'s airfare?

A: No.

Q: What kind of receipt do I need to submit?

A: An electronic ticket (e-ticket) or paper ticket receipt is acceptable. The receipt should be itemized, including, but not limited to, the traveler's name, dollar amount paid by the traveler and a flight itinerary.

RENTAL CAR

Q: Can I get reimbursed for purchasing car insurance while renting a car?

A: Generally, the University advises against the purchase of car insurance because your credit card company may have a car rental provision included. However, a onetime exception may be made, upon prior approval, if you feel it is necessary to have additional coverage.

Q: What kinds of rental car fees are generally unallowable?

A: Generally, car insurance, vehicle upgrades, GPS and other expenses that are considered in excess of basic car rental fees. An exception may be made for GPS when renting a vehicle for an extended period of time while house hunting.

PRIVATE VEHICLE

Q: I would like to drive my car to my new residence. What do I need to know?

A: If you chose to relocate or house hunt via your private vehicle you will need to provide your private vehicle information (year, make and model) and a map of your trip or a start and finish destination. You may be reimbursed for mileage at the current Federal standard mileage rate for moving; gas receipts are **not** allowable. Gas is only reimbursed when renting a moving truck or van. Note: If you are relocating via private vehicle please

remember that we will reimburse you only for a fairly direct route; not a route that takes you several hundred miles off your destination.

CARFARE TOLLS/PARKING

Q: I paid for parking and the parking attendant did not give me a receipt.

A: Parking and taxi receipts are only needed if the charges exceed \$75. (**Each college may have its own internal requirement regarding turning in receipts for reimbursement; however, Academic Affairs requires that **all receipts must** be submitted in order to be reimbursed.***) In addition, you are encouraged to obtain a receipt whenever possible. It will help your Moving Coordinator and help you keep track of your expenses.

COMMERCIAL CARRIER

Q: Do I need three quotes when selecting a mover?

A: If you use one of the [contracted commercial carriers](#), three quotes are not necessary. If a non-contracted carrier is used and the cost of the move is \$5,000 or more, three quotes are required. Once you have selected the moving company, please notify your Moving Coordinator of your choice.

Q: Is my household property insured while being moved and by whom?

A: Most moving companies contracted with the University carry limited liability insurance based on the weight of your goods; however, that value may not be equivalent to the goods' total replacement cost. Likewise, certain items, such as fine art or your automobile, may be expressly excluded from coverage. The insurance coverage and its exclusions vary from agreement to agreement. You are responsible to assess the value of your property and to request additional insurance, if needed. In order to do so, you should review the applicable moving contract (at: <http://www.calstate.edu/csp/contracted-movers.shtml>) and inquire with the moving company about obtaining additional insurance. If unavailable through the contracted insurance company, you may obtain additional insurance through a third party. The cost to purchase insurance to cover the full value of your goods per the approved move can be included as part of your approved moving and relocation allocation.

Q: What if my move is not within the continental U.S.?

A: CSULB does not have any written agreements that cover international moves or moves outside of the continental U.S. For any portion of a move that is outside of the continental U.S. or requires an international move, you must contract directly with a commercial carrier.

RELOCATING OFFICE AND/OR MANY BOOKS

Q: I have a lot of books and would like to know some alternatives on shipping my books?

A: Generally, it is about a dollar a pound to move your books with a mover. An economical alternative is to ship your books in file cabinet folders via the U.S. Post Office, using Media

OTHER RELOCATION QUESTIONS

Q: What kinds of moving expenses are generally unallowable?

A: Expenses in relation to children and pets are unallowable moving expenses.

Q: How long will it take to receive reimbursement for moving and/or house hunting expenses?

A: Once the Moving and Relocation Expense claim is signed and approved, it should take approximately 15 business days to receive reimbursement.

Q: Can I get reimbursed for packing supplies and boxes?

A: Yes.

Q: I need to put my household belongings in temporary storage. How long can I leave my belongings in storage?

A: You may be reimbursed for up to 60 days of temporary storage fees.

Q: My spouse cannot move at the same time that I need to report to work. Can I delay my relocation?

A: Yes, this is quite common for dual income households. Everyone's circumstances are unique; therefore, please discuss your specific situation with your Moving Coordinator.

Q: I need to make more than one relocation trip. Is this allowed?

A: Yes, the University is willing to work with you during your relocation. Discuss the specifics of your move(s) with your Moving Coordinator prior to moving. Your Moving Coordinator can assist you with your relocation concerns.

Q: How and when will I receive reimbursement for my moving expenses?

A: As soon as CSULB Accounts Payable has received an approved Moving and Relocation Expense Claim, you will be issued an accounts payable check. There will be no income tax withholding from this check. If you have arranged for a moving company to bill the Campus directly, this part of your moving and relocation allowance will be paid as soon as Accounts Payable receives an approved invoice from the moving company.

Q: How will I be taxed for my moving expense reimbursements?

A: Tax related to your moving and relocation reimbursement will be deducted from future payroll checks. Details of the amounts and the number of payroll checks that will be affected will be provided to you by the CSULB Tax Specialist in an email shortly after you have received your reimbursement from Accounts Payable.