**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, 661-654-6207. Provide her with your questions and she should respond within 24 hours.
	+ Secondary relocation specialist, Felisitas Alvarado: falvarado3@csub.edu, 661-654-2535.
	+ Payment Services manager, Becky Lappin blappin@csub.edu, 661-654-2531.