



# Administrative Procedure

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Supercedes:	
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**Subject:** MOVING AND RELOCATION EXPENSES

1.0. PURPOSE:

To establish the policy and procedure by which moving and relocation expenses for new employees will be processed.

2.0. ORGANIZATIONS AFFECTED:

2.1. All organizational units of the University, excluding Auxiliaries.

2.2. Important: This procedure, or portions thereof, may be superseded by an agreement between The California State University and an exclusive employee representative.

When referring to this procedure as it relates to actions affecting represented employees, consult the agreement that applies to employees within the represented unit.

3.0. REFERENCES:

3.1. Office of the Chancellor memorandum FSR 85-05, Subject: Internal Regulations Governing Moving and Relocation Expenses.

3.2. Cal State L.A. Administrative Procedures:

3.2.1. Subject: Travel Expenses.

3.2.2. Subject: Interview Expenses.

4.0. POLICY:

4.1. Policies and regulations concerning moving and relocation expenses are under the control of the Board of Trustees of The California State University.

4.2. Persons who change their place of residence to accept employment with the University, hereinafter referred to as "employee", may be entitled to reimbursement as follows. No advance payment shall be made to employees for moving and relocation expenses.

**Approved:**

**Date:**

- 4.2.1. Reimbursement may be allowed for a part of the travel and moving expenses of professional and technically trained persons who change their place of residence to accept employment with the University.
- 4.2.2. The employee must have been appointed to a position or class for which the appointing authority has certified that such expenditure is necessary in order to recruit qualified persons needed by the University.
- 4.2.3. The employee must have changed place of residence for the purpose of accepting employment with the University.
- 4.3. Reimbursement may be allowed for officers or employees who change their residence because of a change in assignment, promotion, or other reason related to their duties. Reimbursement may be granted if the employee's official designated headquarters is changed for the advantage of The California State University, or the employee is transferred by the appointing authority in lieu of layoff of the employee.
- 4.4. Reimbursement for Moving Household Effects--Reimbursement may be allowed for the cost of moving an employee's effects either via a commercial household goods carrier or by the employee personally. No reimbursement will be allowed for the hiring of casual labor.
  - 4.4.1. Moving Via a Commercial Household Goods Carrier--Reimbursement may be allowed, within budgetary constraints, for actual and necessary expenses incurred for packing, insurance, transportation, storage-in-transit (not including warehouse handling charges except when required by interstate tariffs), unpacking and installation at the new location of an employee's household effects. Duration of storage-in-transit for which charges may be reimbursed shall not exceed 60 calendar days.
  - 4.4.2. Moving of Household Effects by the Employee--Reimbursement may be allowed for the movement of household effects by the employee in a truck or trailer if the cost does not exceed the cost that would have been incurred had a commercial firm been used.
- 4.5. Reimbursement of Travel/Relocation and Establishment of Residence Expenses--Reimbursement may be allowed for the cost of an employee relocating and establishing a new residence.

- 4.5.1. Travel/Relocation Via Common Carrier--Reimbursement may be allowed for one-way air fare and mileage to and from the common carrier. (See Allowance Computation, Appendix 8.1.)
- 4.5.2. Travel/Relocation Via Private Vehicle-- Reimbursement may be allowed for lodging, meals, and incidental expenses plus mileage up to the cost of a one-way air fare. (See Allowance Computation, Appendix 8.1.)
- 4.5.3. Establishment of Residence--An employee may be reimbursed for lodging, meals and incidental expenses up to sixty days. This shall terminate immediately upon establishment of a permanent residence. (See Allowance Computation, Appendix 8.1)

4.6. Payment of Claims

- 4.6.1. Claims will be made on the Travel Expense Claim form (Std. 262) through the Director of Financial Management and Services. All claims must be substantiated by invoices or other evidence for each item claimed.
- 4.6.2. Repayment by Employee--If an employee whose travel and moving expenses have been paid does not continue employment with the University for a period of two years (unless the discontinuance was the result of death, prolonged illness, disability, unacceptability of employee to the University department, or similar eventualities beyond the control of the employee as determined by the appointing power), the employee shall repay the following percentage of the amount received as reimbursement for such travel and moving expenses.

100 percent if employed less than six months;  
75 percent if employed six months, but less than 12 months;  
50 percent if employed 12 months, but less than 18 months;  
25 percent if employed 18 months, but less than two years.

5.0. DEFINITIONS:

- 5.1. Appointing Authority--Campus President, or designee.
- 5.2. Employee--Officers, administrators, faculty, and staff of the University (excluding auxiliary organizations).

- 5.3. Headquarters--Place where the employee spends the largest portion of the regular workday or worktime.
- 5.4. Household Effects--Includes furniture, clothing, musical instruments, household appliances, foods, and other items which are usual or necessary for the maintenance of a household. Household effects shall not include automobiles, other motor items, farm tractors, boats, animals, livestock, pets, belongings which are not the property of the immediate family of the employee; belongings related to commercial enterprises engaged in by the employee, firewood, fuels, bricks, ceramic tiles or other building materials.

6.0. RESPONSIBILITIES:

6.1. The Director of Human Resource Management will:

- 6.1.1. Determine if the new staff employee has been appointed to a position that qualifies for reimbursement of moving and relocation expenses.
- 6.1.2. Advise the professional or technically trained staff employee of the entitlement to reimbursement of moving expenses and the conditions governing acceptance of the reimbursement in the appointment letter.

6.2. Senior Administrators will submit a memorandum to the Director of Financial Management and Services indicating the amount of funds to be allowed for the employee's moving and relocation expense reimbursement.

6.3. Deans will:

- 6.3.1. Determine if the new faculty member will receive reimbursement of moving and relocation expenses.
- 6.3.2. Advise the new faculty member of the entitlement to reimbursement of moving and relocation expenses and the conditions governing acceptance of the reimbursement in the appointment letter.
- 6.3.3. Submit a memorandum to the Director of Financial Management and Services indicating the amount of funds to be allowed for the employee's moving and relocation expense reimbursement.

- 6.4. The Employee will submit all invoices, receipts, and Travel Expense Claim form to the Director of Financial Management and Services.
- 6.5. The Director of Financial Management and Services will:
  - 6.5.1. Prepare the Certification for Payment of Moving Expenses form.
  - 6.5.2. Recommend approval of the Certification to the President.
  - 6.5.3. Submit the completed Certification, Travel Expense Claim form (Std 262), and all invoices and receipts to the Accounting Office.
  - 6.5.4. Request a revolving fund check to be issued to the employee.
- 6.6. The President will approve the Certification for Payment of Moving Expenses form.
- 6.7. The Accounting Office will:
  - 6.7.1. Issue a revolving fund check for the approved amount to the employee.
  - 6.7.2. Prepare the final reconciliation to encumber the amount of the claim and schedule reimbursement to the revolving fund.
- 7.0. PROCEDURES:
  - 7.1. The Director of Human Resource Management will advise staff employees of eligibility for reimbursement of moving expenses and of the responsibility to repay all, or a portion of, the expenses in the event the employment is discontinued within two years. The responsible Dean will advise faculty employees of their eligibility for reimbursement and their responsibilities.
  - 7.2. The responsible Dean or Senior Administrator will submit the amount authorized for reimbursement of moving and relocation expenses for the employee to the Director of Financial Management and Services.
  - 7.3. Following the move the employee will submit a Travel Expense Claim form and all receipts and invoices to the Director of Financial Management and Services.

- 7.4. The Director of Financial Management and Services will:
  - 7.4.1. Prepare the Certification for Payment of Moving Expenses.
  - 7.4.2. Submit the documentation to the President for review and approval.
  - 7.4.3. Submit the approved documentation to the Accounting Office for the purpose of reimbursing the employee for moving and relocation expenses.
- 7.5. The Accounting Office will claim the reimbursement of revolving fund expenses from the State Controller's Office, Division of Audits.

8.0. APPENDICES:

- 8.1. Computation of Allowable Expenses.
- 8.2. Travel Expense Claim Form (Std. 262)

**COMPUTATION OF ALLOWABLE EXPENSES**  
**FOR EMPLOYEES MOVING TO ACCEPT A POSITION**  
**AT CALIFORNIA STATE UNIVERSITY, LOS ANGELES**

In computing the allowance for travel in a private vehicle while moving, the following reimbursement will be allowed in any 24-hour period or fractional part thereof (up to the cost of one-way plane fare):

Lodging	\$39.00
Breakfast	4.00
Lunch	7.25
Dinner	14.00
Incidental Allowance	<u>4.00</u>
Total	68.25

Use of Private Vehicle 20.5 cents per mile

If traveling by air, the cost of a one-way fare will be allowed plus 41 cents per mile for transportation to and from the common carrier.