

## **MOVING/RELOCATION REGULATIONS**

### Definitions

Employee: Either a current CSU employee or an individual who has

## Moving and Relocating Reimbursements

The CSU has no contractual arrangement for moving the employee's household goods. The employee must negotiate a personal contract with a mover.

Full or partial reimbursement may be allowed for the actual and necessary expenses incurred for 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, when properly documented by invoices and receipts. Should the employee choose to move himself/herself, reimbursement for such moves may not exceed the cost that would have been incurred had he/she used a commercial moving firm.

The University will not reimburse an employee for his/her time devoted for packing, loading, or unpacking. Only a certified Moving Company may be used. Payments to individuals by the employee, will not vtsl not v(f)1 (i)2 (e)1

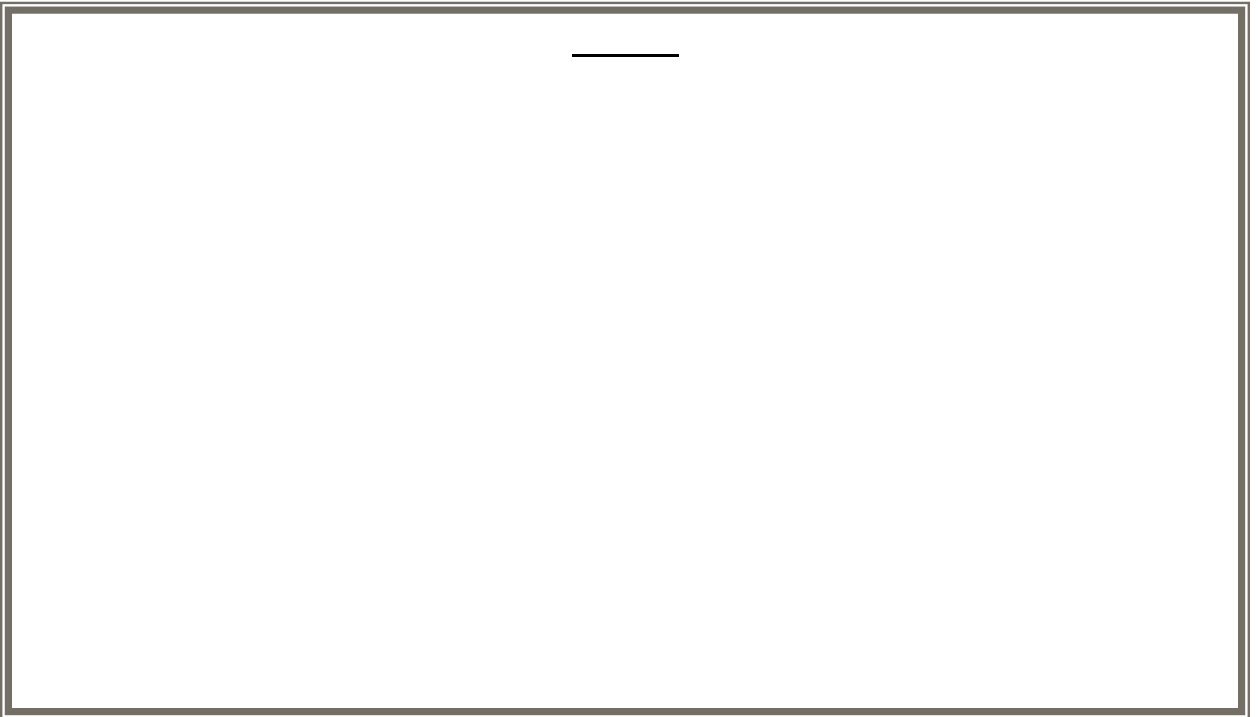
## Procedures for Payment of Moving Reimbursements

Receipts and invoices verifying the actual costs of a move should be submitted on

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California State University  
Internal Procedures Governing Reimbursement for  
Moving and Relocation Expenses

100. Scope.

- A. Current employees. Whenever a current CSU employee is required by the current appointing authority to change his/her permanent place of residence because of a change in assignment, promotion or other reason related to the employee's duties deemed to be in the best interests of the CSU, such employee shall receive reimbursement for his/her actual, necessary and reasonable moving and relocation expenses. To qualify for reimbursement, the new primary job location must be at least 50 miles farther from the employee's former home than the old primary job location.

The appointing authority may authorize exceptions to this requirement in cases where it creates unusual and unavoidable hardship for employees.

- B. Initial appointments. An individual who has been offered a position within the CSU by an appointing authority and has accepted such appointment may receive reimbursement for his/her actual, necessary and reasonable moving and relocation expenses. This provision





**103. Procedure for Payment of Claims.**

Itemized receipts or invoices verifying the actual costs and payment of a move shall be submitted directly by the employee to his/her appropriate appointing authority or designee.

If reimbursement is approved by the appointing authority, appropriate claim forms shall be submitted to the campus accounting office. The campus accounting office may reimburse the employee or carrier directly or submit the claim to the State Controller's Office for payment.

The appointing authority may contract directly with a carrier for moving and relocation services.

**104. Reimbursement for Sale of Residence.**

Whenever an employee is required to change assignment and designated place of work which requires the sale of a residence, the employee may be reimbursed for actual and necessary selling costs as determined by prevailing practices within the area of sale. Claims for reimbursement must be substantiated by the seller's closing escrow statement and other pertinent supportive documents. Actual and necessary selling costs may include:

- A. Brokerage commission;
- B. Title insurance;
- C. Escrow fees;
- D. Prepayment penalties;
- E. Taxes, charges and fees fixed by local authority required to consummate the sale of the residence; and
- F. Miscellaneous seller's costs customary to the area that may be reimbursed if determined appropriate by the appointing authority.

Actual and necessary selling costs will be reimbursed for that portion of the dwelling the employee actually occupies if the employee owns and resides in a multi-family dwelling.

Claims for the sale of a residence must be submitted within one year following the date the employee reports to the new work location designated by the appointing authority. An extension may be granted by the appointing authority upon receipt of evidence warranting such extension.

Reimbursement for sale of a residence that does not conform to these procedures may be granted when the appointing authority has determined that reimbursement is reasonable in light of the individual circumstance and that the employee will otherwise be subject to hardship by reason of the change of residence.



- 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.

This provision does not apply to temporary relocation allowances as described in Section 106.

**109. Institution Responsibility.**

Authorized moving and relocation expenses may result in taxable income to the employee pursuant to state and federal regulations.

The campus shall ensure that a copy of these procedures is given to the employee upon notice to the employee of an impending move.

**110. Effect of Memorandum of Understanding on Internal Procedures.**

Notwithstanding any other provision of these Internal Procedures, if a Memorandum of Understanding entered into pursuant to the Higher Education Employer-Employee Relations Act is in conflict with these provisions, the terms of the Memorandum of Understanding and not the provisions of the Internal Procedures shall govern as to those employees covered by the Memorandum of Understanding.

POLICIES AND PROCEDURES FOR OUT



