



CALIFORNIA STATE UNIVERSITY, LONG BEACH

Subject: Moving and Relocation Expense Reimbursement	
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An individual who has accepted a staff or management position with CSU, Long Beach may receive reimbursement for his/her reasonable moving and relocation expenses. To ensure a consistent and equitable standard for the determination of who is to receive such reimbursement and the amount of such reimbursement the Associate Vice President for Human Resources Management is responsible for the approval of all moving and relocation expense reimbursement offers.

REIMBURSABLE EXPENSES

Full or partial reimbursement, within budgetary constraints, may be allowed for the actual and necessary expenses incurred for the following (only when properly documented by invoices and receipts):

- packing
 - insurance
 - transportation
 - storage in transit (not to exceed 60 calendar days)
 - unpacking and installation of the employee's household goods at the new residence
- Should employees elect to move themselves, reimbursement for such moves may not exceed the costs that would have been incurred had a commercial firm been used.
 - An employee and spouse or domestic partner may be reimbursed for relocation travel (defined as a one-way trip from the former residence to the general area of the new campus or other primary job location), actual lodging expenses, supported by a voucher, plus meal and incidental expenses, in accordance with the CSU Internal Procedures Governing Travel Expenses and Allowances.
 - This allowance shall not be paid for more than 60 days unless the appointing authority has determined in advance that the search for a new residence will result in unusual and unavoidable hardship for an employee and spouse or domestic partner and, therefore, has granted an exception.
 - This allowance shall terminate immediately upon establishment of a permanent residence.

PROCEDURE FOR PAYMENT OF CLAIMS

- Receipts or invoices verifying the actual costs of a move shall be submitted directly by the employee to his/her appointing authority.
- If the appointing authority approves reimbursement, the claim forms shall be submitted to the campus accounting office. The campus accounting office may reimburse the employee 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.

REIMBURSEMENT FOR SALE OF RESIDENCE

When 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 selling costs as determined by prevailing practices within the area of the sale. Claims for reimbursement must be substantiated by the seller's closing escrow statement and other supporting documents. Actual selling costs may include:



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- Brokerage commission
- Title Insurance
- Escrow fees
- Prepayment penalties
- Taxes, charges, and fees fixed by local authority required to complete the sale of the residence
- Miscellaneous seller's costs customary to the area 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. The appointing authority may grant an extension upon receipt of evidence warranting the extension.
- Reimbursement for sale of a residence that doesn't meet the procedures stated above may be arranged when the appointing authority has determined the reimbursement is reasonable in light of individual circumstance and that the employee will otherwise be subject to hardship because of a change in residence.

SETTLEMENT OF A LEASE

When an employee is required to change an official place of work and the change requires the settlement of a lease on the employee's former residence, the employee may receive the actual and necessary cost of settlement of the unexpired lease for a maximum of one year.

- Claims for settlement of a lease shall be documented and submitted to the appointing authority within six months from the employees start date.
- Reimbursement shall not be allowed if the appointing authority determines that the employee knew or reasonably should have known that relocation was about to happen before entering into a lease agreement.

TEMPORARY RELOCATION EXPENSES

- A temporary relocation allowance to defer the cost of housing may be authorized for the duration of a temporary appointment (as described under the section on temporary appointments).
- The allowance may be negotiated at any rate up to and including 75% of the current long-term in-state travel subsistence allowance (see section 105A of the CSU Internal Procedures Governing Reimbursement for Travel Expenses and Allowances).
- A voucher, lease agreement, or other documentation reflecting housing expenses must support the temporary relocation allowance paid to an employee.
- Reimbursement may be claimed by the employee, via the submission of appropriate receipts, no more than once per month.
- Housing expenses for long-term employees may also be paid directly by the temporary appointing authority, up to the maximum reimbursement level noted above.

REPAYMENT OF MOVING AND RELOCATION EXPENSES REIMBURSEMENTS

If the employee does not wish to continue employment with the CSU for reasons other than involuntary separation, disability, death, or other similar unexpected causes beyond the control of the employee as determined by the appointing authority, the employee will be 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.

FORMS: NA