



### General Information

- ☐ Keep track of all expenses related to the move.
- ☐ The reimbursement of expenses shall terminate immediately upon establishment of a permanent residence.
- ☐ All expenses must be actual, necessary, and reasonable.

### Moving of Household Goods

- ☐ Household goods that are usual and necessary for the maintenance of a household are reimbursable.
  - Household effects include items such as furniture, clothing, musical instruments, household appliances, foods, and other usual household items.
- ☐ 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.
  - Items not eligible for relocation reimbursement are: more than one automobile, other motor vehicles, equipment, trailers, boats, animals, belongings that are not the property of the immediate family of the employee, firewood, fuel, and building materials.

### Travel Expenses

- ☐ One house/apartment hunting trip may be included in your relocation allocation. The University will reimburse for the employee and their spouse or domestic partner for transportation plus lodging and meals up to the limits found below. The trip amount will be deducted from the total allowance.
- ☐ Relocation travel expenses is defined as a one-way trip for one (1) vehicle from the former residence to the general area of the new campus or primary job location in accordance with the current reimbursement rate.
- ☐ Mileage is reimbursed for the shortest, most direct, route from the former residence to the Monterey area using [Google Maps](#). If during your trip to your new home you stop over, or make side trips for sightseeing, the additional expense will not be reimbursed. The 2021 mileage rate is \$0.17 per mile. The 2022 mileage rate is \$0.18 per mile.
- ☐ Actual lodging, meals and incidentals will be reimbursed for the employee and their spouse or domestic partner 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%.
- Expenses related to children and pets are unallowable and will not be reimbursed.
- This reimbursement ends upon arrival in Monterey.

### Temporary Lodging/Meals

- ☐ In rare circumstances, an employee and their spouse or domestic partner may be reimbursed for temporary lodging expenses of up to 60 days from arrival, supported by itemized receipts. Please contact Payroll Services for additional information.

### Examples of unallowable expenses (not a complete list):

- Storage units after 60 days
- Alcohol
- Expenses for children, parents, pets, etc.
- Gasoline for private vehicle
- Mileage for rental vehicles
- Meals, lodging, mileage after arrival in Monterey
- Items that do not belong to the immediate family
- Additional nights in the same location
- Multiple trips to and from the prior residence

# Required Backup for a Moving and Relocation Payment Request

- ☐ Original, **detailed** receipts for all expenses.
  - 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.

## Policies and Procedures

This checklist is meant to be an aid and is not a complete list of procedures to be followed.

- The Office of the Chancellor sets CSU internal procedures governing moving and relocation expense reimbursement. Attachment A of the CSU Updated Moving and Relocation Policy provides the details of these internal procedures.
- The travel portion of the relocation follows the [CSUMB Travel Policy and Procedures](#).
- Any exceptions to these procedures must be approved by the Chief Financial Officer or the President.

## Payment Timing

Approved moving and relocation reimbursement payments are issued through the State Controller's Office Payroll system and can only be processed after your first paycheck has been issued. Reimbursements cannot be made prior to your hire date.

## Taxation

Under the Tax Cuts and Jobs Act of 2017, the Federal personal deduction for relocation expenses and the exclusion from Federal income of employer-paid relocation expenses are suspended from January 1, 2018 through December 31, 2025. In accordance with IRS regulations, all reimbursement payments will have applicable payroll taxes withheld at the time of issuance.

## Repayment of Reimbursement

If an employee whose moving and relocation expenses have been reimbursed does not continue employment with CSUMB for a period of at least two years (unless discontinuance of employment was the result of death, disability or other similar unexpected cause beyond the control of the employee as determined by the employer), the employee shall repay CSUMB the following percentage of the amount received for reimbursement for such moving and relocation expenses (including if the employee transfers to another CSU):

| Duration of CSUMB Employment               | Repayment Percentage Due |
|--|--------------------------|
| Less than 6 months                         | 100%                     |
| At least 6 months but less than 12 months  | 75%                      |
| At least 12 months but less than 18 months | 50%                      |
| At least 18 months but less than 24 months | 25%                      |

## Questions?

If you have any questions about moving and relocation, please contact:

- The administrative contact provided by your hiring department.
- Payroll Services: [payroll@csumb.edu](mailto:payroll@csumb.edu), 831-582-3303.