



Moving and Relocation Checklist

General Information

- Keep track of all expenses related to your move.
- An employee and spouse or domestic partner may be reimbursed for one house-hunting trip (round trip from former residence to campus) in addition to relocation travel expenses. No expenses related to other dependents or animals are allowable.
 - 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 Vallejo. However, only one one-way relocation trip per person and the cost of moving one vehicle will be reimbursed.
- Mileage is reimbursed for the shortest, most direct route from the former residence to the Vallejo 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	Refer to CSU Travel Policy
Meals & Incidental Expenses (M&IE)	Refer to CSU Travel Policy

- [Tips and Gratuities](#)
- This reimbursement ends upon arrival in the Vallejo area.

The CSU lodging limit excludes tax, but we do reimburse the taxes paid.

- 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 Financial Services.)

Examples of allowable expenses (not a complete list):

- Boxes and packing material
- Penalty for breaking a lease early
- Mileage using the most direct route
- Rental moving truck & gasoline
- Moving company
- Labor hired to load and unload household goods
- Lodging en route to Vallejo
- Storage unit (up to 60 days)

Examples of unallowable expenses (not a complete list):

- | | |
|----------------------------------|------------------------------------|
| ● Storage units after 60 days | ● Tips over 20% |
| ● Alcohol | ● Lodging after arrival in Vallejo |
| ● Meals after arrival in Vallejo | ● Mileage after arrival in Vallejo |

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 Form 3903](#), moving and relocation expenses 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 employee was reimbursed for the expense(s).

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 located at <https://www.csum.edu/fiscal-services/concur.html>

- [HR Policy 2022-02](#)
- [CSU Moving and Relocation Policy](#)
- The travel portion of the relocation follows the [CSUM Travel Policy Procedures](#).

*******If an employee whose moving and relocation expenses have been reimbursed does not continue employment with CSUM 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 CSUM 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 CSUM 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:

1. The administrative contact provided by your hiring department.
2. Financial Services. Note: we can help with questions about what is and isn't reimbursable but will not know any details of your offer.
 - Financial Services group Phone: (707) 654-1074 or Email: FinancialServices@csum.edu