

**MOVING EXPENSE REIMBURSEMENT POLICY**

APPROVED BY POLICY COMMITTEE 3/24/2023

Effective Date 3/24/2023

(Impact Area – Dept Name)  SUNY Morrisville *Morrisville Campus *Norwich Campus *EOC	(General Subject Area)	(Specific Subject Area)
	<b>Author:</b> Vice President for Administration and Finance	<b>Supersedes Policy #</b>
<b>Relates to Procedure #</b>	<b>Impact:</b>	
<b>Legal Citation (if any):</b>		
<b>SUNY MORRISVILLE</b>		

**Policy Summary**

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Reimbursement for relocation is a reportable expense and is subject to Internal Revenue Service (IRS) tax guidelines. Payment for reimbursement expenses is processed through payroll services.

Authorized full-time State employees, appointed to a period of more than one year, may be reimbursed for the actual moving costs of household goods, personal effects, and transportation costs covered under Moving Expense Regulations G-200 or G-205. MOVING EXPENSE REIMBURSEMENT MUST BE APPROVED BY THE VICE PRESIDENT OF ADMINISTRATION AND FINANCE, AND BE NEGOTIATED DURING THE HIRING PROCESS, PRIOR TO BEING HIRED BY SUNY MORRISVILLE. Final approved moving expense reimbursement details must also be included in the offer letter to the employee at the time of hire.

- [G-200 for Management/Confidential employees](#)
- [G-205 for Negotiating Units](#)

Employees must comply with the NYS “Payment of Moving Expenses Policy”, which supersedes this policy. The link to that policy can be found here. [https://www.suny.edu/sunypp/documents.cfm?doc\\_id=548](https://www.suny.edu/sunypp/documents.cfm?doc_id=548)

Claims for reimbursement must be submitted within **one year** of the effective date of the appointment. If an employee resigns or voluntarily separates within one year of the effective date of appointment, the employee is mandated to reimburse the campus for all relocation expenses paid.

### Eligible Reimbursements

Subject to the approved dollar limitations, an eligible employee shall be reimbursed for:

1. (a) The basic cost of moving household goods and personal effects from the employee's residence at the time of appointment to the residence located near the new place of employment. The carrier should be authorized by New York State. To verify carrier registration please visit the [U.S. Department of Transportation's Federal Motor Carrier Safety Administration webpage](#). When carrier services are estimated at more than \$2,500 and a NYS authorized carrier cannot be used, three (3) estimates should be obtained, and the least costly vendor should be selected. The three (3) quote requirement is waived for international relocation.

The basic cost of moving shall mean the cost of loading, transporting, and unloading household goods and personal effects, including necessary expenditures for handling such household goods as pianos, refrigerators, and deep freezers. Household goods shall **not** be deemed to include automobiles; other motor vehicles; trailers, other than house trailers used as employees' residences; farm tractors, implements and equipment; livestock; boats; animals raised for profit by the employee; belongings which are not the property of the employee's immediate family; belongings related to commercial enterprises engaged in by the employee or his family; and building materials.

(b) The cost of additional insurance above the lowest valuation rate charged.

(c) No reimbursement shall be provided for household goods and personal effects in excess of 12,000 pounds.

(d) If employee does not use a commercial household goods carrier, they shall be reimbursed for the basic cost of moving household goods and personal effects by rental of trailers or trucks from commercial establishments.

(e) Reimbursement also includes carriers other than moving companies, such as standard shipping services by FedEx, UPS, etc.

2. The cost of packing and/or unpacking of household goods and personal effects if such services provided by the carrier are used.
3. The cost of storage of goods in-transit for actual storage and for required warehouse handling, provided such services are required. Reimbursement shall not be provided for storage or handling of goods more than 12,000 pounds.

4. The cost of transportation of the employees/appointees and their families to the new location, at the rate paid by the State for the use of personally owned automobiles on official business, the mileage to be measured by the shortest highway route between the two places of residence. Payment shall be made at such rate for one automobile, regardless of the number owned, or actual method of transportation used, including airfare.

### Ineligible Reimbursements

1. Transportation of automobiles, boats, and other motor vehicles
2. Household goods and personal effects more than 12,000 pounds
3. Temporary housing and pre-move expenses
4. Meals

### Processing of Reimbursement Request

1. The employee/appointee completes the [Standard Voucher \(AC92\)](#) (see form with instructions) summarizing the detail of allowable expenditures, following the guidelines provided above ([G-200/G-205](#)). The employee/appointee and their supervisor certify the form.
2. The employee/appointee completes the [AC1099-S](#) (see form with instructions) and signs the agreement.
3. Welcome letter from the Supervisor with approved moving expense reimbursement limits must be included.
4. The employee/appointee attaches a bill of lading or freight bill issued by the carrier showing the charges collected and copies of the three (3) estimates, including the receipted bill in the event a NYS certified carrier is not used. Attach a copy of the rental truck agreement, if applicable.
5. The employee/appointee submits [Standard Voucher \(AC92\)](#) with all applicable receipts and documents attached, including [AC1099-S](#). Include [AC3259-S](#) (see form with instructions) if needed.
6. The completed relocation reimbursement package should be submitted to the Administrative Assistant of the hiring department/office. The package will be reviewed for completeness, signed, and forwarded to Purchasing and Accounts Payable Office for processing.

Forms

- [Request for Moving Expense Reimbursement \(AC1099-S\)](#)
- [Standard Voucher \(AC92\)](#)
- [Statement of Incidental and Transportation Expenses \(AC3259-S\)](#)

**Contact Information**

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