

Academic Affairs (AA) Moving Expense Procedure

Important Notes:

- Moving Expenses Reimbursement/Allowance **must** be included in the contract.
- If the reimbursement/allowance was not included, you will need to process another Dean's Recommendation form to include the language.
- If the amount exceeds the limits outlined in the [SG 1.18.1's Employee Relocation Compensation Schedule](#), you will need to include an exception memo approved by the appropriate delegated authority. All memos need to be submitted to Hunter Bass.
- Please read [Controller's Office policy SG 1.18 for Moving and Relocation](#) on Confluence for the most up-to-date procedures and requirements.

Relocation Allowance – Must use Non-State funding

- Make sure the moving allowance amount and funding source are in the hiring proposal so it's included in the contract.
- Moving Allowances must be paid using non-state funds.
- Complete the [Taxable Reimbursement and Benefits Reporting form](#) located on the Controller's Office forms Confluence page.
 - o Attach the approved contract.
 - o **This cannot be submitted until the employee's first day of employment.**
- Add Hunter Bass (basshw) as an approver for **all** allowances.
- If this is for a Tenured/Tenure-track faculty member that AA provides \$1,000 for, you may include AA's fund 227507.

Moving Expense Reimbursement – State Funding and Non-State Funds (Reimbursement (must have receipts))

- Make sure the moving reimbursement amount and funding source are in the hiring proposal/Dean's Recommendation so it's included in the contract.
- Complete the [Moving and Relocation Expense Authorization form](#).
 - o Include the required estimates and the signed contract.
 - o Add Hunter Bass as one of the approvers.
- After you receive the approved Moving and Relocation Expense Authorization form, and on the employee's first day of employment, you can complete the [Taxable Reimbursement and Benefits Reporting form](#) located on the Controller's Office forms Confluence page.
 - o Add Hunter Bass (basshw) as an additional approver for **all** Moving Expense Pre-Approvals and Reimbursements

- Make sure the moving reimbursement amount is in the contract.
- The reimbursement is limited to what is included in the contract. List only the amount that is in the contract on the reimbursement line.
- You will need to attach:
 - A copy of the fully approved Moving and Relocation Expense Authorization form
 - The signed contract
 - The Moving and Relocation Expense Log
 - All receipts to support the payment request.
 - Include all receipts showing a zero balance to support the Moving Reimbursement.
 - Please note the reimbursement will only be made for the amount of receipts you have attached.
 - If any receipts are missing or not complete, the [Missing/Incomplete Receipt Affidavit form](#) will need to be completed and included in the request.
- Select "Moving Expense Reimbursement"
- If this is for a Tenured/Tenure-track faculty member that AA provides \$1,000 for, you may include AA's fund 227507 on the **same** form as your State Fund.

Please contact me with questions.

Hunter Bass (basshw) 2-7694

You may use the next page to send to the person who is moving seeking a reimbursement to provide guidance for a moving reimbursement. You will need to attach the Moving Authorization form and Log to the email. Forms can be found on the [Controller's Office forms Confluence page](#).

The last two pages are for you to use when processing the documentation and reimbursement forms.

Academic Affairs Moving Expenses - Instructions & Checklist

Welcome to Appalachian State University and the Boone, NC Community! We are happy to provide you with a reimbursement to help with your moving expenses. There are limitations on what expenses can be reimbursed. For guidance, please see the instructions and checklists below. All forms and updated moving policies and procedures can be found on the [Controller's Office spending policy SG 1.18](#) and the [Controller's Office forms Confluence page](#).

Candidate Steps for Moving Authorization:

- 1) The Moving and Relocation Authorization form must be completed **prior** to the move.
 - a. As defined by OSBM, the move must be completed within 2 days and in 1 trip.
- 2) Include 3 bids from professional moving companies. Bids should include shipment weight, number of cartons, charges for loading and unloading, and cost of transit insurance. If you are self-moving, submit 1 professional moving bid as a cost comparison. Include estimates for truck rental, packing supplies, mileage, etc. for self-moving costs.
- 3) If you request airfare, please include this amount in either or both the "House hunting expenses (limitations apply)" or "Moving day travel and subsistence (limited to 2 days)" lines on the Moving Authorization depending on which (or both) you choose to use.
- 4) Send the bid information with the authorization to your Departmental Administrator.
 - a. *Tell the departmental administrator which bid you prefer.* If your preferred company is not the least expensive, please give clear justification.
- 5) Once the Moving Authorization is complete, you will receive approval from the Department Admin via email. When you receive the email, you may begin your move.
- 6) Keep all receipts, which should show a zero balance where applicable. If you are claiming hotel lodging, include a zero-balance folio and method of payment. If you pay with a check, please provide proof it was received and deposited by the company. If any receipts are missing or not complete, the Missing/Incomplete Receipt Affidavit form will need to be completed and included in the request (you will work with the department admin for guidance).
- 7) As a reminder, supplemental insurance is **not** reimbursed on rental vehicles. Preferred seating or advanced seating on flights is **not** reimbursable unless no other seating option is available. You must show a screenshot of the booked seating chart as justification.
- 8) Once the move is complete, submit a completed [Moving and Relocation Expense Log](#), attach all receipts, and submit to your Departmental Admin via email.
 - a. If any receipts are missing or not complete, the Missing/Incomplete Receipt Affidavit form will need to be completed and included in the request.
- 9) Please be patient once you have submitted your request. It can take one month or more for reimbursements to be approved and processed.
- 10) Your reimbursement will be processed through Payroll. You will receive your reimbursement in your monthly paycheck, and if the reimbursement does not get paid out in the current payroll cycle, it will be paid out in next month's check.
- 11) You may be asked to provide clarification or additional receipts if there are questions. This can potentially delay the reimbursement process.
- 12) **Important:** Please note that per Federal Law, Moving Expenses are taxable as a lump sum payment.
- 13) **Important:** The University cannot pay Moving Expenses on your behalf; we can only reimburse.

Departmental Admin Moving Authorization Checklist:

- ☐ All moving reimbursement and allowance amounts must be included in the contract.
- ☐ If using State funds, you must have the moving authorization form fully approved before the move.
- ☐ Moving Authorization is located on the [Controller's Office forms Confluence page](#).
- ☐ The form is fully completed, and the email address for the requestor is included in the Requester Information section.
- ☐ If requesting a Commercial Move: Three bids from separate commercial movers are attached.
- ☐ If requesting a Self-Move: At least ONE estimate is included from a commercial mover.
 - ☐ If the commercial estimate is LESS than the cost for a self-move, please have the candidate include written justification for the request.
- ☐ One-time appliance connection fees are acceptable with required proof of payment. Appliance Connection Costs *do not include deposits*.
- ☐ Meals: Per Diem has been calculated based on the in-state or out-of-state rates, depending on where the expense occurred for breakfast, lunch, and dinner.
 - ☐ [State Subsistence Rates](#), NOT the federal subsistence rates.
- ☐ As of July 1, 2025, mileage is calculated at 25 cents per mile, and the request is substantiated by a Google Map or MapQuest PDF printout.
- ☐ All potential allowable expenses have been listed on the Moving Authorization.
- ☐ The requestor/mover has signed the authorization (electronic signatures are acceptable; please attach an email from the candidate verifying their request).
- ☐ **Very Important:** All commitments and fund numbers have been listed on the Moving Authorization prior to final approval by the Provost. These approved commitments will need to be equal to or less than the final reimbursement total. Please include any Dean's Office commitments and fund numbers.
- ☐ **Very Important:** Departments need to check the preferred moving bid. The lowest bid should always be selected unless there is clear justification given for a higher bid.

Once the pre-approval form has been completed and approved by the department Chair, send it to the Dean's Office via email for approval. The Dean's Office will approve and email it to Academic Affairs (Hunter Bass [basshw](#)) for final approval by the Provost.

When the authorization is approved, you will receive an email with the approved Moving Authorization form. Please keep this form in its entirety for reimbursement purposes.

Please review [SG 1.18 Moving and Relocation Expenses](#) for details and requirements for allowable moving expenses.

Taxable Expense/ Reimbursement Reporting Form

Moving Expenses Checklist:

- ☐ Include Academic Affairs as the last approver for ALL moving allowances and reimbursements. (Hunter Bass)
- ☐ Check the Banner ID against the name and verify we are paying the correct person.
- ☐ Complete an electronic [Taxable Reimbursements and Benefits Reporting Form](#) located on the Controller's Forms Confluence Page.
 - ☐ The account # is 615310 for all Moving Expenses. As a reminder, you will need to use a budget revision to put the budget in these account lines.
 - ☐ There is one line per entity paying the expenses.

Dept Fund #	Acct #	Amount Covered
College Fund #	Acct #	Amount Covered
Division Fund #	Acct #	Amount Covered

Note: Academic Affairs pays \$1,000 towards all Tenure-track faculty Moving Expenses. Please use 227507 for AA's fund #.
- ☐ The total amount to be reimbursed should be *equal to or less than* the final approved amount on the Moving Authorization.
 - ☐ If the reimbursement amount exceeds the pre-approval amount, you must submit a justification memo stating the original approved amount, the new requested amount with clear justification, and it must be signed and dated by your supervisor. Any amounts exceeding the pre-approved total will require additional approval by the Provost.
- ☐ All receipts must be complete, itemized, and showing a zero balance.
 - ☐ If any receipts are missing or not complete, the Missing/Incomplete Receipt Affidavit form will need to be completed and included in the request (you will work with the department admin for guidance).
- ☐ Itemized receipts for movers, including U-Haul, must be included.
- ☐ The original fully approved Moving Authorization is attached.
- ☐ A Google Maps, MapQuest, etc. printout is attached to verify all mileage driven.
- ☐ Moving and Relocation Expense Log is completed and attached ([Moving and Relocation Expense Log](#)).
- ☐ If requesting House Hunting Expenses for 2 days, proof of lodging must be included.
- ☐ If requesting lodging, an itemized folio must be included with a zero balance.
- ☐ If using Commercial Movers, the Bill of Lading is included.
- ☐ If requesting meals, per diem has been calculated based on in-state and out-of-state rates for the location the expense was incurred for breakfast, lunch, and dinner.
 - ☐ NOTE: The state per diem rates are used here, not the federal per diem rates.
- ☐ Combine all documents into a single PDF and include them with the Taxable Form.
- ☐ As a reminder, add Hunter Bass (basshw) as an approver for all moving allowance/reimbursements.

If **ANY** of the above-listed items have not been met or the amount reimbursed exceeds the original authorized amount, a memo must be included as to why we are outside of NC OSBM Policy.