

Academic Affairs Moving Expenses - Instructions & Checklist

Welcome to Appalachian State University and the Boone, NC Community! We are happy to provide you 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 Office of the Controller's website at controller.appstate.edu.

Candidate Steps for Moving Authorization:

1. The Moving and Relocation Authorization form must be completed **prior** to the move.
 - 1.1. 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.
 - 4.1. *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 Academic Affairs 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. All credit card receipts must include the last 4 digits of the card number. If you pay with a check, please provide proof it was received and deposited by the company. Any receipts not showing proof of payment will need a full-page bank statement to substantiate the claims. You may redact information not pertaining to the move.
 - 6.1. 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.
7. Once the move is complete, submit a completed Moving and Relocation Expense Log, attach all receipts, and submit to your Departmental Admin via email.
8. Please be patient once you have submitted your request. It can take one month or more for reimbursements to be approved and processed.
9. 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.
10. You may be asked to provide clarification or additional receipts if there are questions. This can potentially delay the reimbursement process.
11. **Important:** Please note that per Federal Law, Moving Expenses are taxable as a lump sum payment.
12. **Important:** The University cannot pay Moving Expenses on your behalf, we can only reimburse.

Questions? Contact x 7330 or x 7312 ~ Updated 11/13/2020 aph

Departmental Admin Moving Authorization Checklist:

(Note: As of July 1, 2020, all Moving Expenses are to be submitted electronically).

- Moving Authorization is located on the Controller's website. **You will have to sign in to see these forms.** (<https://controller.appstate.edu/forms/all-forms>)
- 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-moving, 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 in-state and out-of-state rates dependent on where the expense occurred for breakfast, lunch, and dinner.

*Example: For most **two** day moves/house-hunting, for **two** people, these rates are: 2 people at 1 night out-state and 1 night in-state = $(39.4 \times 2) + (42.1 \times 2) = 78.8 + 84.2 = \163*
- As of January 1, 2020, mileage is calculated at 17 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 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.

Direct Pay for Reimbursement of Moving Expenses Checklist:

(Note: As of July 1, 2020, all Moving Expenses are to be submitted electronically).

- Check BID against the name and verify we are paying the correct person.
- The address listed on the Direct Pay Form is the requestors new address.
- Complete an electronic Direct Pay Form
(https://controller.appstate.edu/system/files/41t_direct_pay_.pdf):
 - "Payable To" and "Requestor" must be the person receiving the Moving Expense Reimbursement. Electronic signatures must have an email from the individual verifying their request.
 - The account # is 615310 for all Moving Expenses. As a reminder, you will need to use a budget revision to put budget in these account lines.
 - There is one line per entity paying the expenses on the Direct Pay Form. Example:

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 leave AA's fund # blank and we will fill it in.
- 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 are submitted with proof of payment showing the last 4 digits of the credit card used. If a personal check, cashier's check, etc. has been used for payment, a photo of the cleared check is included.
- Itemized receipts for movers, including U-haul, must be included.
- The original fully approved Moving Authorization is attached.
- A Google Maps, MapQuest, etc. print out is attached to verify all mileage driven.
- Moving and Relocation Expense Log is completed and attached
(<https://controller.appstate.edu/forms/all-forms>)
- 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.
- Combine all documents into a single PDF and submit to Autum Hawkins (hawkinsap) for processing.
- AA will reach out to you once your packet has been submitted to Payroll for processing.

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.