

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.

Steps for Moving Authorization:

- The Moving and Relocation Authorization form must be completed prior to the move.
- 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 not using a professional moving company yourself, get 1 professional mover bid for a cost comparison. Include cost for truck rental, packing supplies, mileage, etc. for self-moving costs.
- If you will be requesting airfare, please include this 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.
- Send this bid information with the pre-approval form to your Departmental Administrator.
 - Tell the departmental administrator which bid you prefer. If your preferred company is not the least expensive, please give clear justification.
- 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.
- While moving KEEP ALL RECEIPTS, which should be itemized and show a zero balance where applicable. If you are claiming hotel lodging, the folio must be included. If you are paying with a credit card, the last 4 digits of the card must be present on the receipt. If you are paying with a cashier's check, etc. you must provide proof the check was received and deposited by the company. If you have receipts not showing proof of payment, please submit a full-page bank statement to substantiate the claims. You may redact information not pertaining to the move.
- As a reminder, supplemental insurance is not reimbursed on rental vehicles and preferred seating or advanced seating on flights is not reimbursable.
- Once the move is final, complete a Direct Payment Form, the Moving and Relocation Expense Log, attach all receipts, and submit to your Departmental Admin.
- Please be patient once you have submitted your request. It can take one month or more for reimbursements to be approved and processed.
- 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.
- You may be asked to provide clarification or additional receipts if there are questions. This can potentially delay the reimbursement process.
- **Important:** Please note that per Federal Law, Moving Expenses are taxable as a lump sum payment.
- **Important:** The University cannot pay Moving Expenses on your behalf, we can only reimburse.

Departmental Admin Moving Authorization Checklist:

- Position Number is included at the top of the form.
- 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 AND the estimate is LESS than the cost for a self-moving option.
- 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 total*
- Mileage is calculated at 20 cents per mile and the request is substantiated by a Google Map or Mapquest print out.
- All potential allowable expenses have been listed on the Moving Authorization.
- The requestor/mover has signed the authorization (electronic signatures are not accepted at this time).
- 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. If a higher bid is chosen, the requestor must wait until the authorization is fully approved by the Provost before moving.

Once the pre-approval form has been completed and approved by the department Chair, send it to the Dean's Office for approval. The Dean's Office will approve and send it to Academic Affairs for final approval by the Provost.

Direct Pay for Reimbursement of Moving Expenses Checklist:

- 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.
- Direct Pay Form is fully completed:
 - "Payable To" and "Requestor" must be the person receiving the Moving Expense Reimbursement and they must sign the form. No one can sign on their behalf and electronic signatures are not allowed at this time.
 - 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 generate a memo stating the original approved amount, the new requested amount with clear justification, and must be signed and dated by your supervisor. Any amounts exceeding the pre-approved total will require additional approval by the Provost.
- All receipts have been accounted for and proof of payment is attached for each 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.
- If requesting **House Hunting Expenses for TWO days**, proof of lodging must be included. If the requestor stayed with relatives, friends, etc. there must be an attached email chain documenting the stay.
- 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 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 total*

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