



**The College at Brockport  
State University of New York**

**Category:**

Office of Human Resources

**Responsible Office:**

**Procurement & Payment Services**

**585-395-2351**

**Policy Title:** Moving Expenses for  
New Appointees

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**Policy:**

This policy summarizes The College at Brockport's guidelines for reimbursing moving expenses to a New York State new appointee when transporting themselves and their families and household effects to their new place of residence. It is not the policy of Brockport to reimburse such appointees for related expenses in relocation, such as buying a house, temporary living quarters (lodging), meals or airfare. This policy does not apply to new "non-state" appointees hired by the Brockport Auxiliary Services Corporation, the Research Foundation, the Brockport Student Government or any other non-state entity.

**I. General**

A. The Department of Civil Service has released to the State University of New York its authority over positions in the professional service relative to determining whether there is a shortage of qualified candidates, and the University shall continue to make its own determinations on the authorization of relocation expenses for professional service employees.

Each new appointee to the professional service and new appointees to other than the professional service, provided that the Department of Civil Service has determined that there exists in New York State a shortage of qualified candidates for the position, may be considered for the reimbursement of relocation expenses incurred upon initial appointment at the University.

B. Reimbursement of travel and moving expenses shall be payable from monies appropriated and available to the departments and agencies. Reimbursement of travel and moving expenses of employees whose salaries are paid from a fund other than the general fund shall be a proper charge against such other fund.

C. Reimbursement of relocation expenses is not mandatory. It is a procedure established to assist in the recruitment of qualified candidates, and it is not expected that every appointee would be authorized payment of relocation expenses. The determination of who is to receive such reimbursement and the amounts of such reimbursement is discretionary with the appointment officer. It is suggested that each campus establish guidelines with respect to the ground rules

for approving reimbursement of relocation expenses. If such guidelines are established, a copy should be sent to:

University-wide Human Resources  
State University of New York  
State University Plaza  
Albany, New York 12246

## **II. Appointees Eligible for Reimbursement**

- A. Persons initially appointed to a full-time, professional position as defined in Subdivision 3 of [Section 355a of the Education Law](#).
- B. Persons initially appointed to other full-time technical, scientific, educational, professional or administrative positions for which position the Department of Civil Service has found that there exists in New York State a shortage of qualified candidates.
- C. An initial appointment shall mean the first full-time appointment by the State University of New York, or by one of its constituent campuses, except that an appointment subsequent to a first appointment shall be deemed to be an initial appointment if such appointment is made not less than three years following termination of an earlier appointment.
- D. No reimbursement for moving and travel expenses shall be made unless such reimbursement is approved by the appropriate appointing officer.

## **III. Appointees Not Eligible for Reimbursement**

- A. Appointees to be employed for a period of one year or less.
- B. Appointees employed on a part-time basis.
- C. Persons already in the service of the State of New York who are eligible for and receive reimbursement for relocation expenses pursuant to the provisions of [Section 202 of the State Finance Law](#).

## **IV. General Provisions Governing Eligibility for Reimbursement**

- A. New York State Division of the Budget's Bulletins G-200 and G-205 stipulate that moving expenses may be reimbursed when the distance from the employer's old workplace to new workplace is at least 35 miles.
- B. The federal criteria for determining taxability of reimbursements is different. It states that if the distance from an employee's old residence to the new workplace is at least 50 miles more than the distance from the old residence to the old workplace, the reimbursement is not taxable. However, if the increase in commuting distance is less than 50 miles, the moving expense reimbursement is

taxable, requires withholding of income and employment taxes, and must be reported as wages on the employees W-2 (New York State Office of the State Comptroller [Accounting Bulletin A-497](#) – Reporting Moving Expense Reimbursements).

## **V. Relocation Expenses Eligible for Reimbursement**

Appointees eligible for reimbursement shall be reimbursed for actual and necessary moving and travel expenses incurred in an aggregate amount not in excess of \$3,000, provided that claim for such payment is made within one year of the effective date of the appointment. Subject to the aforesaid dollar limit, an eligible appointee may be reimbursed for:

A. The basic cost of moving household goods and personal effects from the appointee's residence at the time of initial appointment to the residence located near the new place of employment, provided that the mover used a carrier authorized by the New York State Department of Transportation or the Interstate Commerce Commission to perform such service.

1. Household Goods are defined as all reasonable items of furniture, furnishing, clothing, appliances, tools and equipment, including necessary expenditures for handling such items as pianos, refrigerators and deep freezers.
2. Not included are such items as automobiles and other motor vehicles; (see Section D following) trailers other than house trailers used as appointee's residence; building materials; animals raised for profit, farming equipment, livestock, boats; belongings not the property of the appointee's immediate family; and belongings related to commercial enterprises engaged in by the appointee or his family.
3. The cost of additional insurance above the lowest valuation rate charged.
4. No reimbursement shall be provided for household goods and personal effects in excess of 12,000 pounds.
5. If an appointee does not use a commercial household goods carrier, he/she shall be reimbursed for the basic cost of moving household goods and personal effects by rental of trailers or trucks from commercial establishments provided the claim is accompanied by three competitive bids. Reimbursement shall be made at the rates proposed in the lowest bid.
6. Division of the Budget allows up to \$200 if no commercial carrier or rental trucks are used (see G200, 154.2-B,1,V).

B. The cost of packing and/or unpacking of household and personal effects if such services provided by the carrier are used.

C. The cost of transportation of the appointee and his/her family to the new location, at the rate paid by New York State for the use of personally-owned automobiles for 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.

D. Expenses other than those enumerated above incurred by the appointee as a result of relocation shall not be subject to reimbursement.

## **VI. Repayment of Monies Advanced**

In the event that an appointee resigns or voluntarily separates within one year of the effective date of appointment, the campus president shall arrange to collect from the appointee monies for relocation expenses and transmit such monies to the state treasurer in accordance with the provisions of [Section 121 of the State Finance Law](#). When such monies cannot be collected by the campus president, the claim shall be transferred to the New York State attorney general who shall take whatever action is necessary to collect the monies advanced.

## **VII. Exceptions to Above**

The restrictions and limitations of these regulations may be waived by the New York State director of the budget if he/she determines that such restrictions and limitations would result in an unusual and unavoidable hardship for the appointee. Requests for such waivers are to be submitted for review to:

University-wide Human Resources  
State University of New York  
State University Plaza  
Albany, New York 12246

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### **Procedure:**

The process of gaining reimbursement is initiated through preparation of Request for Reimbursement for Moving Expense Agreement ([Form AC-1099](#)).

1. The appointing officer must answer all questions pertaining to the move of the appointee and complete the certification block.
2. The appointee must sign the repayment agreement on the form.
3. If the appointment is to a classified service position, then a copy of a letter from the Department of Civil Service stating a shortage of qualified candidates for the position must be attached.
4. A receipted original or carbon copy of the Bill of Lading or Freight Bill must be attached. Additionally, if a certified carrier is not used, copies of

three competitive bids must be included. If the moving expense exceeds \$3,000, three competitive bids must be attached for submission by University-wide Human Resources to DOB to request over-the-maximum approval. This may occasionally be approved in extraordinary circumstances.

5. A Standard Voucher ([Form AC-92](#)) must be attached providing a summary of the details of allowable expenditures, as provided in the guidelines enumerated in the Division of the Budget's Policy and Reporting Manual, Item G-220 (those guidelines are summarized above).

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**Forms:**

[Form AC-1099](#)

[Form AC-92](#)

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**Reference(s):**

In support of this policy, the following links and/or references to additional resources for related information are included:

Office of the State Comptroller, [Accounting Bulletin No. A-497](#) "Reporting Moving Expense Reimbursements."

New York State Budget Policy and Reporting Manual G200 "Moving Expense Regulations for Management/Confidential Employees."

New York State Budget Policy and Reporting Manual G-205 "Moving Expense Regulations for Employees in Certain Negotiating Units."