

MOVING EXPENSES POLICY

Category: Business and Finance

Responsible Office: Comptroller's Office

Date Established: 08/01/2004

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POLICY SUMMARY

Section 204 of the New York State Finance Law authorizes the reimbursement of certain expenses incurred by new technical, scientific, educational, professional, or administrative appointees to a department or agency when transporting themselves and their families and household effects to their new places of residence. It is not the policy of New York State to reimburse such appointees for related expenses in relocation, such as buying a house or renting temporary living quarters.

POLICY

Background

New appointees are not guaranteed moving expenses. Moving expense reimbursement is offered at the discretion of college officials. The cost of moving expense reimbursement is charged to the department or vice president's office authorizing the payment.

New appointees are responsible for making their own moving arrangements and paying moving costs. Moving expense claims are reimbursed by New York State after the move based on original receipts. There is no provision for advance payment.

Moving expense payments are recorded on employee W-2 forms for the year in which the reimbursement is made.

Applicability

This policy applies to SUNY Buffalo State employees.

Responsibility

Vice Presidents

- Must give advance approval of the amount of moving expense to be offered and designate the funding account prior to the offer to the appointee.

Comptroller

- Meets with appointee to review submitted expenses and receipts and determines their eligibility for reimbursement.
- Prepares Standard Voucher (Form AC-92) and Request for Reimbursement of Moving Expense Agreement (Form AC 1099).

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- Routes completed forms to appropriate Vice President and, for out-of-state appointees, to the President for signature.
- Submits all documents to Accounts Payable and Travel Services Office for payment processing.

Accounts Payable and Travel Services Office

- Processes submitted voucher for payment. Payment is deposited to appointee's designated bank account used for payroll direct deposit, or payment is mailed to appointee's home from Albany if no direct deposit account has been designated, usually within 30 days of the date the voucher is processed by the Accounts Payable and Travel Services office.

Appointee

- Moving expense forms and vouchers must be completed at the time of review by the Comptroller. New appointees who have been offered moving expenses should call the Comptroller's Office for an appointment (716-878-4312).
- Prior to the appointment with the Comptroller, the appointee must provide current home and former work and home addresses, including zip codes, to the Comptroller's Office.
- At the time of the scheduled meeting with the Comptroller, appointee will provide original receipts and a copy of the appointment letter, indicating that reimbursement of moving expenses is being offered.

Procedure

1. Allowable Expenses

If a moving company is used, the basic cost of packing, loading, transporting, unloading and unpacking of household goods and personal effects may be reimbursed. These costs must be receipted on a Uniform Bill of Lading provided by the Moving Company. Inventory pages should also be obtained. In addition, a transportation allowance may be included in the amount of one-way car mileage for one car at the current IRS mileage rate. The maximum amount that may be paid is \$2,000, or a lower maximum offered by the department. If actual receipted expenses are less than the maximum amount offered, the actual expenses may be paid.

If a rental truck is used, the receipted cost of the truck rental may be reimbursed along with any packing material provided by the rental company and billed on its invoice. Also, receipted gas and tolls for the rental truck may be reimbursed. For moves using a rental truck, costs for packing, loading, unloading, and unpacking may be not paid. A transportation allowance may be paid in the amount of one-way car mileage for one car at the current IRS mileage rate. The maximum amount that may be reimbursed is \$2,000 or a lower maximum offered by the department. If the actual receipted expenses are less than the amount offered, the actual expenses may be paid.

2. Unallowable Expenses

Only the expenses specified above may be reimbursed. Other expenses associated with a move will not be paid. Some examples of expenses that will not be paid include travel costs to find a house or apartment, meals and lodging during a move, transportation costs other than the specified mileage

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allowance, costs of selling or buying a house, or renting temporary living quarters. Since this is a New York State policy, these provisions are not negotiable.

3. Deadline for Filing

Moving expenses should be submitted for payment as soon as possible after the move. Claims must be submitted within one year of the appointment date.

RELATED INFORMATION

Documents and Forms:

[Standard Voucher \(Form AC-92\)](#)

[Request for Reimbursement of Moving Expense Agreement \(Form AC-1099\)](#)

Other Information:

[SUNY Procedure: Moving Expenses, Payment of](#)

[State Finance Law, Section 204](#) (Link provided as a convenience. It is not an official link to NYS laws.)

CONTACT INFORMATION

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REVISION HISTORY

Date of change: 03/09/2015

Brief description of edit: Minor edits to procedure; adapted to standard template

APPROVAL

Approved prior to 2016