Reimbursing Employee Relocation/Moving Costs

CUNYfirst Expense Report Entry
Appointees who are eligible and approved for reimbursement shall be reimbursed for actual and necessary moving and relocation expenses incurred by the appointee and immediate family members, up to a combined total included in the offer letter, if the claim for such payment is made within one year of the effective date of the appointment.

After beginning work at CUNY, the new employee must complete an expense report in CUNYfirst for the eligible relocation expenses actually incurred and attach the following documentation:

- Copy of the executed Offer Letter
- Completed **Request/Agreement for Moving Expense Reimbursement Form**
- Three (3) Quotes (as applicable)
  - Carrier/mover authorized by the New York State Department of Transportation
  - One-way economy class airfare for appointee and immediate family
  - Rental of trailer or trucks from commercial establishment

Reimbursements shall be made at the rates proposed in the lowest quote

- All Original Documents
- Receipts for all expenses claimed
- Proof of actual payment (credit/debit statements)
- Copy of the Bill of Lading or Freight Bill
- **Expense Itemization Worksheet**
- **Statement of Automobile Travel** (as applicable)
  - If a personal vehicle was used to transport immediate family to the new location
  - Please include distance verification (Google Maps, Waze, MapQuest, etc.)

For the policy, please refer to CUNY’s [Reimbursing Employee Relocation/Moving Costs: Guidelines and Procedures](#) or the [Summary for Employee Relocation/Moving Reimbursement](#).
RELOCATION REIMBURSEMENT PROCEDURE
CUNYfirst Expense Report Entry

CUNYfirst Access
Completed by person requesting reimbursement or department proxy

- **Claim your CUNYfirst Account**
- **Log on to CUNYfirst**
How to Create an Expense Report

- Click Financial Supply Chain
Click **Employee Self-Service**
Click **Travel and Expense Center**

Then click **Create** under **Expense Report**
➢ Click **Return to Expense Report** to create a new Expense Report.
RELOCATION REIMBURSEMENT PROCEDURE
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General Information of the Relocation

- Enter “Relocation” into the *Description: field
- Select Site Visit from the *Business Purpose listing
Click magnifying glass next to the Default Location field

Select Description from the Search by: listing

In the begins with field, enter the new residence by typing the two-character state abbreviation, a space, and the location. Then click Look Up

Click on the correct description of the location of your new residence
Details of the Relocation

Only one line is necessary for all expenses

- Select 1 Moving Expenses from the *Expense Type listing

- In *Expense Date field, click the calendar icon and click on the first date of the relocation
RELOCATION REIMBURSEMENT PROCEDURE
CUNYfirst Expense Report Entry

- Enter the total cost of the relocation expenses into the *Amount Spent* field.

- Select **Non-reimbursable** from the *Payment Type* listing.

- Click *Detail*.
Review the data in the fields populated by the Expense Report

- Enter a description of the relocation into the *Description: field

- Click **Check Expense for Errors**
  - *CUNYfirst will highlight fields with errors or missing information that require revision*

- Click **Return to Expense Report**
Once all the expense fields have been completed

- Click **Expense Location Details**
RELOCATION REIMBURSEMENT PROCEDURE
CUNYfirst Expense Report Entry

- Enter address of former residence, new residence, along with date and times of travel
- Then click OK
Uploading Required Relocation Documentation

- Click **Attachments** or paper clip icon
Click **Add Attachment**

Click **Browse…** or **Choose File** (depending on browser) to upload required documents

Click on document and then click **Open**
RELOCATION REIMBURSEMENT PROCEDURE
CUNYfirst Expense Report Entry

- Click **Upload**

- Click **Add Attachment** to upload additional documents

- Enter description of uploaded documents onto the **Attachment Description** field adjacent to its **File Name**
  - See Required Documents list on page 1

- Click **OK** once all documents related to the relocation have been uploaded
Submitting your completed Expense Report for Approval

Once required information has been entered:

- Click **Save For Later** to review and edit at a later time before submitting

Or

- Click **Submit** for payment approval
RELOCATION REIMBURSEMENT PROCEDURE
CUNYfirst Expense Report Entry

- Click OK to submit

- Click Printable View
Click the Report ID number
RELOCATION REIMBURSEMENT PROCEDURE
CUNYfirst Expense Report Entry

- Print, sign and date the printable version of your Expense Report
- Submit completed Expense Report with the required documentation to your department chair, dean or vice president for approval