

MEMORANDUM

TO: PERSONNEL MANAGEMENT LIAISONS DATE: June 3, 1996
REFERENCE CODE: 96-022

THIS MEMORANDUM SHOULD BE DISTRIBUTED TO:

Appointing Powers
Accounting Administrators
Relocation Liaisons
Personnel Officers

FROM: Department of Personnel Administration
Labor Relations Division

SUBJECT: New Relocation Rule - New Hires to Excluded Positions

Attached is a copy of Department of Personnel Administration (DPA) Relocation Rule 599.723.1, applicable to persons who are being newly hired to the State into excluded positions, adopted/effective June 1, 1996.

This rule contains the same provisions of DPA Rule 599.723 as follows:

- The rule is for persons who are new to State service only. The individual must be hired into a position that has been identified by the appointing power as hard to fill.
- The rule provides for the movement of household goods up to \$1,000 unless the Department of Finance approves additional expenditure for the movement of household goods.
- The rule provides for the pro-rated reimbursement to the State should the employee not remain employed for two years.

This rule differs from existing DPA Rule 599.723 as follows:

- It is applicable only to hires into excluded positions.
- The mileage rate is increased from .06 cents to .09 cents per mile.
- The distance must be 75 miles from the appointee's residence to the new headquarters.

With the advance approval of the Director of the Department of Personnel Administration, an appointing power may offer:

1. Up to 30 days of relocation meals and lodging at the rates and requirements established for excluded employee travel, some of which may be for pre-move house hunting;
2. Up to \$200 receipted miscellaneous expenses as defined in 599.715.1; and
3. Claims must be submitted no later than six months after the report date.

DPA approval to reimburse meal/lodging expenses and/or miscellaneous expenses must be obtained in writing prior to making an offer or commitment to reimburse those expenses. Requests for approval for this reimbursement must be signed by the appointing power or his/her designee, and include the name of the appointee, the position class and title, the locations of the employee's home and new headquarters, the efforts in recruitment that have established the position as difficult to fill, and the extraordinary circumstances that justify State reimbursement of the additional relocation.

Employees with questions are directed to contact their department relocation liaison, generally located in their headquarters accounting office. Liaisons with questions should call Terrie Jordan at (916) 324-9377, CALNET 454-9377.



Rick McWilliam
Chief of Labor Relations

Attachment

DEPARTMENT OF PERSONNEL ADMINISTRATION

ARTICLE 7. Moving and Relocation Expenses

599.723.1 Travel and Moving Expenses of Persons Who Are Required To Change Their Place of Residence in order to Accept Employment With The State - Excluded Employees

(a) Reimbursement may be allowed for all or part of the travel and moving expenses of professional and technically trained persons who are required to change their place of residence to accept employment with the State under the following conditions:

(1) The employee must have been appointed to a position or class for which the appointing power has certified that such expenditure is necessary in order to recruit qualified persons needed by the State.

(2) The employee must have changed his/her place of residence for the purpose of accepting employment with the State.

(3) The employee is new to State employment or reinstating to State employment after a permanent separation.

(4) The established headquarters is more than 75 miles from the employee's primary residence.

(b) An employee who meets the criteria established in (a) above may, at the discretion of the appointing power, be reimbursed for relocation expenses as follows:

(1) Reimbursement for the expenses for the movement and storage of household goods in accordance with 599.718.1, 599.719.1, and 599.724.1 to a maximum of \$1,000. Approval of the Appointing Power and the Department of Finance is required on any claim under this subsection in excess of \$1,000.

(2) Reimbursement for travel from the old residence to the new residence at the rate of .09 cents per mile. Reimbursement for travel expenses of members of the employee's family will not be allowed.

(c) With advance approval from the Director, Department of Personnel Administration, an employee who meets the criteria in (a) may, at the discretion of the appointing power be reimbursed for relocation expenses, in addition to those in (b)(1) and (2) above, for all or part of the following:

(1) Reimbursement for a maximum of 30 days of temporary lodging and meals at the new headquarters location, limited to the conditions, maximums and receipt requirements applicable to State employees' travel reimbursements as set forth in 599.619 (a) and (b). Up to 14 of the 30 days may be used for pre-move house hunting at the new headquarters location, reimbursable after the report date.

(2) As described in 599.715.1, reimbursement for up to \$200 of receipted expenses for installation, connection, or assembly of appliances, antennas or utilities that are related to the establishment of the new household. Deposits are not reimbursable.

(d) Claims for reimbursement of relocation expenses under this rule must be submitted no later than six months from the reporting date. No reimbursement will be issued prior to the employee reporting to the new headquarters.

(e) If an employee whose travel and moving expenses have been so paid does not continue his/her employment with that State department for a period of two years (unless the discontinuance of his/her employment was the result of death, prolonged

illness, disability, unacceptable assessment of the employee by that State department, or similar eventualities beyond the control of the employee as determined by the appointing power), he/she shall repay the following percentage of the amount received as reimbursement for such travel and moving expenses:

- 100 percent if employed less than 6 months
- 75 percent if employed 6 months but less than 12 months
- 50 percent if employed 12 months but less than 18 months
- 25 percent if employed 18 months but less than 2 years