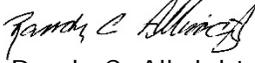


MANAGEMENT DIRECTIVE

Commonwealth of Pennsylvania Governor's Office

Subject: Moving Employee Household Goods	Number: 625.3 Amended
Date: April 30, 2018	By Direction of:  Randy C. Albright, Secretary of the Budget
Contact Agency: Office of the Budget, Office of Comptroller Operations, Bureau of Planning & Management, Telephone 717.787.6496	

This directive establishes policy, responsibilities, and procedures for moving household goods, under the authority of *The Administrative Code of 1929 § 216 (71 P.S. § 76)*. This amendment clarifies the procedures on agency use of a commercial carrier, as well as the procedure for employees to move on their own.

- 1. PURPOSE.** This directive establishes policy, responsibilities, and procedures for moving household goods, under the authority of *The Administrative Code of 1929 § 216 (71 P.S. § 76)*.
- 2. SCOPE.** This directive applies to all departments, boards, commissions, and councils (hereinafter referred to as "agencies") subject to *The Administrative Code of 1929 § 216 (71 P.S. § 76)*.
- 3. OBJECTIVE.** To ensure timely and consistent approval and payment of expenses relative to moving household goods.
- 4. DEFINITIONS.**
 - a. Commercial Carrier.** A carrier holding appropriate Pennsylvania Public Utility Commission (PUC) certificates.

- b. **Firm Quoted Price.** The agreed upon maximum amount that a commercial carrier may invoice the commonwealth for moving household goods. Commercial carriers will generally calculate the firm quoted price on the basis of the following:
 - (1) Estimated weight of items to be moved, multiplied by a stated rate per hundred-weight on moves over 40 miles.
 - (2) Estimated hours multiplied by hourly rates applicable to vehicles, drivers, helpers, and supervisors required on moves of 40 miles or less.
- c. **Household Goods.** Furniture, appliances, home furnishings, fixtures, utensils, clothing, apparel and other property **owned by an employee** for use in a dwelling.
- d. **Transfer Travel Status.** A period of time where employees are eligible for reimbursement of certain living expenses while providing adequate time for locating and moving to the new living quarters, in accordance with labor agreements and *Management Directive 230.10, Commonwealth Travel Policy*.

5. POLICY.

- a. *The Administrative Code of 1929, § 216 (71 P.S. § 76)* authorizes payment for moving household goods upon approval of the Governor in writing and under both of the following conditions:
 - (1) The employee has been employed by the same agency for more than one year.
 - (2) The employee is required by the head of the agency, by which employed, to change residence from one place in Pennsylvania to another.
- b. For the purpose of this directive, an employee is considered to have been required to move in one of the following instances:
 - (1) When the employee would be terminated if he or she did not relocate as directed by the employing agency.
 - (2) When the employee is requested to relocate by the employing agency because the agency considers the relocation to be in the best interests of the agency (If the employee refuses to move, that person's employment will not be jeopardized).
 - (3) When the employee applies for a position that, at the time of application, did not require relocation but when the employee is offered the position, it has been transferred to another locality and the employee, as a condition of accepting the position, must relocate.
 - (4) When the employee is a state police officer and accepts a position or promotion that requires relocation.
 - (5) Any other situation in which the employee did not make a voluntary decision to relocate but must relocate due to a management decision.

- c. A commonwealth employee (other than a state police officer) who applies for a position, which at the time of application would require relocation, is not eligible for reimbursement of moving expenses.

NOTE: Agencies will refer requests for moving expense reimbursement that do not fit one of the statements in sections 5.a. or 5.b. of this directive to the Office of the Budget, Office of Comptroller Operations, Bureau of Commonwealth Payroll Operations, for a determination of whether the agency should reimburse the employee for moving expenses.

- d. Employees should move household goods using a commercial carrier. However, agency heads may authorize employees to move household goods on their own.

(1) Using a commercial carrier.

- (a) Moving household goods requires at least two written bids from commercial carriers.
- (b) All bidders must complete [Form STD-272](#), Firm Quoted Price Agreement (Form STD-272) for moving household goods. The firm quoted price generally will be based on the estimated cost of the actual move plus other charges for insurance, cartons, and packing. Storage charges are not permitted.
- (c) The successful bidder should be determined based on the lowest firm quoted price. Selection of a commercial carrier other than the lowest firm quoted price bidder must be justified, in writing, as being in the best interests of the commonwealth.
- (d) Payment to the successful bidder shall be the lesser of the following:
 - 1 The amount shown on Form STD-272; or
 - 2 An amount equal to the total weight of items actually moved or actual hours required to complete the move, multiplied by the applicable rates plus other quoted charges. Additional charges arising out of obstructions at moving sites, (e.g., inoperative elevators, parking restrictions, and ongoing construction), which were beyond control of the commercial carrier, require agency substantiation and approval.
- (e) Invoices submitted by commercial carriers must be accompanied by a delivery receipt and, where applicable, a weight certificate.

- (2) Authorizing employees to move on their own.** If an employee is authorized to use a rental vehicle, the rental vehicle fee, equipment rental fees, and gasoline costs may be claimed in accordance with *Management Directive 230.10, Commonwealth Travel Policy* and *Manual 230.1, Commonwealth Travel Procedures Manual*. Authorization is subject to the following:

- (a) The total cost of the move is not greater than the cost of a commercial carrier.
- (b) The commonwealth is not held liable for any injury or damages to persons or property as a result of an employee moving household goods.
- (c) Employees must move household goods on their own time (non-workdays or leave approved in accordance with *Management Directive 505.7, Personnel Rules*). Since all such moves will occur on the employee's own time, incurred travel expenses will not be reimbursed.

6. RESPONSIBILITIES.

Commonwealth agencies will comply with the procedures on moving employee household goods listed herein.

7. PROCEDURES.

a. Using a Commercial Carrier.

- (1) **Employee.** Completes [Form STD-202](#), Request for Transfer Travel Status/Moving Expenses (Form STD-202); obtains agency authorized signature; and submits Form STD-202 to BCPO.
- (2) **Office of the Budget, Office of Comptroller Operations, Bureau of Commonwealth Payroll Operations.** Approves or disapproves Form STD-202 and distributes copies to the employee and the agency.
- (3) **Agency.**
 - (1) Arranges for commercial carriers to survey household goods to be moved and obtains completed Form STD-272.
 - (2) Selects commercial carriers based on the lowest firm quoted price stated on Form STD-272 and prepares [Form STD-277](#), Request for Approval of Moving Expenses (Form STD-277). Selection of a commercial carrier other than the lowest firm quoted price bidder must be justified as to being in the best interests of the commonwealth.
 - (3) Forwards Form STD-277, along with copies of Form STD-272, to the PUC, Bureau of Technical Support, Motor Carrier Compliance Office for verification that the selected commercial carrier has PUC authority.
- (4) **Pennsylvania Public Utility Commission, Bureau of Technical Support, Motor Carrier Compliance Office.** Approves or disapproves Form STD-277 and returns Form STD-277 and copies of Form STD-272 to the agency.
- (5) **Agency.** Forwards Form STD-277 (after PUC approval), along with copies of Form STD-272, to BPS.

(6) Office of the Budget, Office of Comptroller Operations, Bureau of Payable Services.

- (a) Receives Form STD-277 along with copies of Form STD-272 and determines whether or not funds are available for the move.
- (b) Approves or disapproves Form STD-277 and notifies the employee and the agency.
- (c) If Form STD-277 has been approved, establishes a funds commitment for the move.

(7) Agency. Awards the move to the selected commercial carrier.

b. Using a Rental Vehicle to Move on Your Own.

(1) Employee.

- (a) Completes Form STD-202 and obtains agency authorized signature.
- (b) Submits Form STD-202 to BCPO *including* a memo, signed by the employee and agency head, stating that the employee is aware that the commonwealth is not liable for any injury or damages to persons or property as a result of moving household goods.

(2) Office of the Budget, Office of Comptroller Operations, Bureau of Commonwealth Payroll Operations. Approves or disapproves Form STD-202 and distributes copies to the employee and the agency.

(3) Employee. Completes the move and submits a travel expense report requesting reimbursement for the costs of the rental vehicle, equipment rental, and gasoline. (Receipts are required for each expense item claimed. Since all such moves will occur while the employee is on personal time, no travel expenses will be reimbursed).

This directive replaces, in its entirety, *Management Directive 625.3*, dated March 14, 1996.