UC IRVINE RELOCATION EXPENSE FORM

Note: subtotal and total fields do not calculate; you must manually enter expense totals before submitting to Accounting.

Refer to <u>UC Policy G-13</u> for list of allowable expenses for non-academic titles (MSP and PSS) and Regents Policy 7710 Senior Management Group Moving Reimbursement.

Department is required to submit *all receipts* of reimbursable final moving expenses for auditing purposes. Include a copy of the offer letter and if reimbursing more than 50% of moving expenses for Academic appointments include the exceptional approval letter.

Incomplete forms may be returned to department contact.

Child 1 Child 3 Other (explain) Rental Car: Ground Transportation: Lodging: B. Temporary Hous ✓ Refer to appropria	\$s busing & Meals ing & meals (if temporate policy for the number notel receipts required. Check in Date:	Meals: Personal Vehicle Miscellaneous E. , up to 30 days orary lodging does not allowable days.	e: xpenses: \$ Subt	sotal of House Huroking facilities) in th Attach spread Refer to Secti	_	tal of 2A) \$able to the employee.
Child 1 Child 3 Other (explain) Rental Car: Ground Transportation: Lodging: B. Temporary House V Refer to appropria V Original itemized h	\$\$ s s busing & Meals ing & meals (if temporate policy for the number notel receipts required.	Meals: Personal Vehicle Miscellaneous E. , up to 30 days orary lodging does not allowable days.	e: xpenses: \$ Subt	Child 2 Child 4 Other (explain) State of House Hurse oking facilities) in the Attach spread Refer to Section	Airfare paid by emportanting Expenses: (Total e new work area are taxas sheet if more detail is nee on 2C for meal Cap requi	ployee:\$ tal of 2A) \$ able to the employee. ded. irements.
Child 1 Child 3 Other (explain) Rental Car: Ground Transportation: Lodging: B. Temporary Hous ✓ Refer to appropria	\$\$ ss ousing & Meals ing & meals (if temporate policy for the number	Meals: Personal Vehicle Miscellaneous E. 4, up to 30 days orary lodging does not of allowable days.	e: xpenses: \$ Subt	Child 2 Child 4 Other (explain)	Airfare paid by emptonting Expenses: (Total e new work area are taxasheet if more detail is nee	ployee:\$ tal of 2A) \$ able to the employee.
Child 1 Child 3 Other (explain) Rental Car: Ground Transportation: Lodging: B. Temporary Ho	\$\$ \$ \$ ousing & Meals	Meals: Personal Vehicle Miscellaneous E.	e: expenses: \$	Child 2 Child 4 Other (explain) \$ \$ cotal of House Hur	Airfare paid by em	ployee:\$ tal of 2A) \$
Child 1 Child 3 Other (explain) Rental Car: Ground Transportation: Lodging:	\$\$ \$\$	Meals: Personal Vehicle Miscellaneous E	e: xpenses: \$	Child 2 Child 4 Other (explain) \$	- Airfare paid by em	ployee:\$
Child 1 Child 3 Other (explain) Rental Car: Ground Transportation:	\$ \$	Meals: Personal Vehicle	e: xpenses: \$	Child 2 Child 4 Other (explain) \$	- Airfare paid by em	ployee:\$
Child 1 Child 3 Other (explain) Rental Car: Ground Transportation:	\$ \$	Meals: Personal Vehicle	e:	Child 2 Child 4 Other (explain) \$	_	
Child 1 Child 3 Other (explain) Rental Car:	\$	Meals:		Child 2 Child 4 Other (explain)	_	
Child 1 Child 3 Other (explain)				Child 2 Child 4 Other (explain)		
Child 1 Child 3				Child 2 Child 4		
Child 1				Child 2		
г				C /D /		
✓ (Taxable Experexpense inform	nses): Expenses paid the nation for auditing pur	nrough the EDB/Emp poses.	ployees pa	yroll department due	_	h payroll. requirements. Provide taxable quire exceptional approval.
"NO" Total reimbu	rsements related to th	e relocation will be	<u>taxable</u> an			system on a MOV - Dos Code.
4) Have <i>all three</i> of	the above requirements tions 2-4 of the Reloc		Yes	No		
Were the individual's m		-				
3) Commencement of	-			No		
-					period immediately follo	owing the employee's start date?
2) Time Requirement			_	No		
principal place of work	?			the employee's old re	esidence than was his/he	r former
1) Distance Requirer				No		
ECTION 1: IRS	Time & Distan	ce Requiremen	nts			
				Dept. Contact E	Email	
Emp. ID#				Dept. Contact P	Phone	
Start Date Emp. ID#				Department Con	ntact	
Start Date						

Subtotal of Temporary Housing & Meals Expenses: (Total of 2B) \$

of more with overlingin as		ns. No exceptions in exceeding the dai			r current cap) for travel 24 hours er diem,		
Total meals:\$	_ Date:	# of people:	Total meals:\$	Date:	# of people:		
Total meals:\$	Date:	# of people:	Total meals:\$	Date:	# of people:		
			Subtotal of Meals	Final Move: (Tot	al of 2C) \$		
2D. Rental Car &	Gas Exp	enses (while primary vehicle is be	eing shipped) Attach o	original itemized r	eceipts.		
Rental Car \$	Renta	al Car Gas Expense \$					
		Subtot	al Rental Car & Gas	Expenses: (Total	al of 2D) \$		
2E. Storage char	ges incur	red before and after the trai	nsit \$	(Tot	al of 2E) \$		
S 001 ug 0 01.un	800		—————————————————————————————————————				
		Total Taxable Expen	ses (paid through pa	ayroll): (Total of	2A – 2E) \$		
SECTION 3: Final	Move						
3A. Third Party Ex	xpenses -	Moving company, storage, etc. f	For auditing & repor	ting purposes or	ly. (Non-Taxable Expense		
		ust be made via a conventional mode of tran-	sportation using the shortes	st and most direct route	available and in the shortest period		
of time normally required to the		tance. form for auditing and reporting purposes.					
Attach the original re	ceipts with this	form for auditing and reporting purposes.					
			Invoice(s):				
oving company name:			Cost of shipping personal vehicle(s) \$				
		\$	Cost of shipping	g personal vehicle(s) \$		
oving company name:ousehold move total:		\$ \$			only: \$		
ousehold move total:							
ousehold move total:		\$	Storage charges	incurred in transit (only: \$		
ousehold move total:		\$		incurred in transit (only: \$		
ousehold move total: 10% lab, library, office mo	ve	\$	Storage charges	incurred in transit (only: \$		
busehold move total: 0% lab, library, office mo SECTION 4: Reim	ve abursable	\$ Total Final Move T	Storage charges	incurred in transit (only: \$		
susehold move total: 0% lab, library, office mo SECTION 4: Reim 4A. Transportatio	ve abursable n (Expenses	Total Final Move T	Storage charges	incurred in transit (only: \$		
susehold move total: 0% lab, library, office mo SECTION 4: Reim 4A. Transportatio	ve abursable n (Expenses	Total Final Move Total Final Final Move Total Final Final Move Total Final Fina	Storage charges Fransportation Expense	incurred in transit (only: \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1	bursable n (Expenses	Total Final Move Total Final Final Move Total Final Final Move Total Final Fina	Storage charges Fransportation Experiments Spouse/Partner Child 2	incurred in transit (only: \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1 Child 3	ve abursable n (Expenses	Total Final Move Texpenses (Non-Taxable Expenses spaid out-of-pocket by employee)	Storage charges Transportation Expense ase) Spouse/Partner Child 2 Child 4	incurred in transit (only: \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1 Child 3	ve abursable n (Expenses	Total Final Move Total Final Final Move Total Final	Storage charges Fransportation Expense Spouse/Partner Child 2 Child 4	enses: (Total of 3	only: \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1 Child 3 Other (explain) Car mileage:	ibursable n (Expenses	Total Final Move Total Final Final Move Total Final	Storage charges Transportation Experies Ise Spouse/Partner Child 2 Child 4 Other (explain)	enses: (Total of 3	A) \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1 Child 3 Other (explain) Car mileage: Car license plate #:	ibursable n (Expenses	Total Final Move Texpenses (Non-Taxable Expenses paid out-of-pocket by employee)	Storage charges Fransportation Expenses Spouse/Partner Child 2 Child 4 Other (explain)	enses: (Total of 3	A) \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1 Child 3 Other (explain) Car mileage: Car license plate #:	tbursable n (Expenses	Total Final Move Total Final Move Total Final Move Total Final Move Total Move Total Move Total dollar amount for mileage:	Storage charges Fransportation Expense Spouse/Partner Child 2 Child 4 Other (explain)	enses: (Total of 3	mployee: \$		
SECTION 4: Reim 4A. Transportatio Employee Child 1 Child 3 Other (explain) Car mileage: Car license plate #: (Refer to G-28 Appendice)	abursable n (Expenses	Total Final Move Total Final Move Total Final Move Total Final Move Total Control Final Final Move Total Control Final F	Storage charges Fransportation Expense Spouse/Partner Child 2 Child 4 Other (explain)	enses: (Total of 3 Airfare paid by e	mployee: \$		

4B. Lodging during final move (if new employee drove instead of flying) *Original itemized receipt required.* Check out Date: Rm+tax (Total):\$ Number of Nights_____Check in Date: # of people: Number of Nights Check in Date: Check out Date: Rm+tax (Total):\$ # of people: Subtotal Lodging Expenses: (Total of 4B) \$ 4C. Miscellaneous Expenses Parking: __ Tolls: \$ Other Expenses: \$ Other Expenses: \$ Identify: Other Expenses: \$ Identify: Subtotal Miscellaneous Expenses: (Total of 4C) \$ **Total Reimbursable Expenses (4A - 4C) \$ SECTION 5. Accounting Information 5A. Full Accounting Unit** (to be completed by department) **CHART** ACCOUNT SUB-ACCOUNT OBJECT SUB-OBJ **PROJECT** ORG REF ID AMOUNT 2700 2700 2700 2700 Approval Signature: Date: Approver Name: Approver Title:

Notes

- * Departments are responsible for submitting the original receipts in case of audit.
- * Attach a copy of the OFFER LETTER.
- * Reimbursements for academic appointments are allowed at 50% of actual moving expenses.
- * Qualified moving expense reimbursements are to be processed (i.e., reported on the employee's W-2 form) within the same calendar year in which the expenses were incurred.
- * Resources:
 - * G-13 (MSP/PSS Titles) http://policy.ucop.edu/doc/3420347/BFB-G-13
 - * SMG Moving Reimbursement Regents Policy 7710: http://policy.ucop.edu/_files/smg-docs/smg_move_reimburse.pdf
 - * Accounting Webpage http://www.accounting.uci.edu/travel/relocation/overview.html