

UC IRVINE RELOCATION EXPENSE FORM

ACADEMIC APPOINTEES

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

References [APM 560](#), [APM 561](#), [APM 550](#) removal policies for eligible Academic Personnel
 Moving & Relocation Expenses – UCI website: <https://accounting.uci.edu/moving>

Department is required to submit:

- *All receipts with proof of payment* of reimbursable final personal moving expenses for auditing purposes.
- Include a copy of the signed offer letter. Redact compensation information.
- If reimbursing more than 50% of personal move expenses for eligible Academic appointments include the signed exceptional approval letter.
- If reimbursing an Academic title is not eligible per the APM-560-14 policy the signed Vice Provost/Academic Personnel exceptional approval letter is required.

Employee Name _____	Hiring Department _____
Payroll Title _____	Dept. Contact Name _____
Start Date _____	Dept. Contact Phone _____

Immediate Family Member’s Full Names

Name _____	Relationship _____

SECTION 1: Time & Distance Requirements – answer all four questions.

1. Meet the Distance Requirement? _____ Yes _____ No
 The distance between the employee’s new job location and his/her former principal residence must be at least 50 miles more than the distance between the employee’s previous work location and his/her former principal residence.
2. Meet the Time Requirement? _____ Yes _____ No
 Will the employee work full time for at least 39 weeks during the 12-month period immediately following the employee’s start date?
3. Commencement of Work Requirement _____ Yes _____ No
 Moving expenses incurred within one year from the time the employee first reports to the new job?
4. Have **all three** of the above been met? _____ Yes _____ No

SECTION 2: Move/Relocation Expenses

2A. Temporary Housing (Up to 30 days) – **Academics require written exceptional approval.**

Policy: Temporary housing - *Original itemized receipts with proof of payment required.*
 Attach a spreadsheet for additional details. Refer to Section 2B for meal cap requirements.

Number of Nights: _____ Check In Date: _____ Check Out Date: _____ Room & Tax Total: _____ # of People: _____

Total Meals	\$ _____	Date: _____	# of People	_____
Total Meals	\$ _____	Date: _____	# of People	_____
Total Meals	\$ _____	Date: _____	# of People	_____
Total Meals	\$ _____	Date: _____	# of People	_____

Sub-Total of Temporary Housing & Meals Expenses (2A) \$ _____

2B. Meals During Final Move

Policy: Meals & IE, employees are required to claim actual costs not to exceed the per person daily cap (refer to University California G-28 Travel Regulations, Appendix B) for travel 24 hours or more with overnight accommodations. Provide itemized receipts. No exceptions in exceeding the per person daily cap. M&IE cap shall not be treated as a per diem reimbursement.

Total Meals \$ _____ Date: _____ # of People _____
Total Meals \$ _____ Date: _____ # of People _____
Total Meals \$ _____ Date: _____ # of People _____
Total Meals \$ _____ Date: _____ # of People _____

Sub-Total of Meals during Final Move Expenses (2B) \$ _____

2C. Rental Car & Rental Gas Expenses (while primary vehicle is being shipped) - *Attach itemized receipts with proof of payment.* Policy: Vehicle rental, category up to **Intermediate** size. Larger vehicles considered an upgrade will require written exceptional approval.

Rental Car \$ _____ Gas Expense \$ _____

Sub-Total of Rental Car & Gas Expenses (2C) \$ _____

2D. Storage (Up to 30 days) – **Academics require written exceptional approval.**

Storage – charged incurred before and after transit \$ _____ Sub-Total of Storage (2D) \$ _____

TOTAL EXPENSES SECTION 2 - (Total of 2A-2D) \$ _____

SECTION 3: Employee Expenses

3A. Third-Party Expenses – Moving company - labor hours, supplies, storage, etc. A move from the old to the new residence must be made via a conventional mode of transportation using the shortest and most direct route available and in the shortest period normally required to travel such a distance. *Provide the moving company's original itemized receipts with proof of payment.*

Moving Company Name: _____ Total: \$ _____

Household personal move misc. expenses (moving supplies: boxes, bubble wrap, tape, etc.) Total: \$ _____

100% Lab, library move to Campus Total: \$ _____

The moving company must provide a separate quote and invoice from household goods, showing the lab/library move expense direct to UCI Campus. This is required documentation.

Sub-Total of Third-Party Expenses (3A) \$ _____

3B. Vehicle Transport - Shipped

Deposit \$ _____ Final Payment \$ _____

Academics require written exceptional approval.

Sub-Total of Vehicle Transport, Shipped Expenses (3B) \$ _____

3C. Vehicle Transport - Driven, Employees drive personal vehicle instead of flying.

Academics require written exceptional approval.

Actual travel expenses for the employee and immediate family, not to exceed the cost of air coach transportation. If claiming meal costs in route, must be in accordance with UC Policy G-28 Travel Regulations.

Car mileage: _____ Total dollar amount for mileage: \$ _____

Mileage rate for personal vehicles reimbursed at the rate published in the UC G-28, Appendix A. Mileage reimbursed based on most direct route from former residence to new residence. Provide Google Map or MapQuest.

Moving truck rental: \$ _____ Moving truck rental fuel: \$ _____ Ground transportation: \$ _____

Sub-Total Transport Expenses - (3C) \$ _____
TOTAL EXPENSES SECTION 3 - (Total of 3A-3C) \$ _____

SECTION 4: Relocation Expenses

A. Air Transportation – Coach/Economy Class – One way airfare from former residence to new residence.

AIRFARE paid by the employee: \$ _____ -Include air confirmation with ticket numbers and proof of payment.

Employee Name _____ Spouse/Partner _____
Child 1 _____ Child 2 _____
Child 3 _____ Child 4 _____
Other (explain) _____ Other (explain) _____

Sub-Total Air Transportation Expenses - (Total of 4A) \$ _____

4B. Lodging during Final Move

Employees drive a personal vehicle instead of flying.

Attach the lodging original itemized receipts with proof of payment.

Total # Nights				Room & Tax Totals		Total # of People			
# of Nights	_____	Check in date	_____	Check out date	_____	Rm & Tax	\$ _____	# of People	_____
# of Nights	_____	Check in date	_____	Check out date	_____	Rm & Tax	\$ _____	# of People	_____
# of Nights	_____	Check in date	_____	Check out date	_____	Rm & Tax	\$ _____	# of People	_____

Sub-Total Lodging Expenses - (Total of 4B) \$ _____

4C. Miscellaneous Expenses

Parking: \$ _____ Tolls: \$ _____

Other Expenses: \$ _____ Explanation: _____

Other Expenses: \$ _____ Explanation: _____

Other Expenses: \$ _____ Explanation: _____

Sub-Total Miscellaneous Expenses - (Total of 4C) \$ _____

TOTAL EXPENSES SECTION 4 - (Total of 4A – 4C) \$ _____

SECTION 5: Accounting Information

5A. Full Accounting Unit - to be completed by the department.

CHART	ACCOUNT	SUB-ACCOUNT	OBJECT	SUB-OBJ	PROJECT	ORG REF ID	AMOUNT

Employees should be aware all moving household and personal removal expense reimbursements are taxable/reportable. Taxes will be automatically deducted from the payment and reported on the employee’s current year W-2. Amounts will be treated as taxable whether they are reimbursed to an employee or paid directly to a vendor.

EMPLOYEE SIGNATURE: _____ Date: _____

Dept. Approver Signature: _____ Approver Title: _____ Date: _____

IMPORTANT NOTES:

- The employees and departments are responsible for submitting the original receipts with *proof of payment*.
- Include a copy of the signed OFFER LETTER & if applicable the signed exceptional approval memo/letter.
- Reimbursements for eligible academic appointments are allowed at 50% of actual moving expenses.
- Qualified moving expense reimbursements will be processed and reported on the employee's W-2 form.

REFERENCE:

- Accounting Move & Relocation web page: <https://accounting.uci.edu/moving/>
- APM 560 Removal Policy: https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-560.pdf
- APM 561: https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-561.pdf
- APM 550: https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-560.pdf