

UC IRVINE RELOCATION EXPENSE FORM

Senior Management Group

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

Reference [Regents Policy 7710 Senior Management Group Moving Reimbursement](#)

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.
- Exceptional approvals must be in writing, signed and attached in the Move/Relo Reimbursement document.

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

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: Expenses

2A. Senior Management Group: Pre-Move House Hunting Expenses.

All other classifications require a signed department exceptional approval memo/letter.

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

SMG Employee Out of Pocket Expenses - Pre-House Hunting:

Airfare	\$ _____	Car Rental	\$ _____	Lodging	\$ _____	Meals	\$ _____
Ground Transportation	\$ _____	Miscellaneous Expenses	\$ _____	Personal Vehicle	\$ _____		

Sub-Total of SMG Pre-Move House Hunting Expenses (2A) \$ _____

2B. Temporary Housing (up to 90 days) & Meals (Up to 30 days)

Policy: Temporary housing & meals, refer to the move policy for eligibility and allowable number of days.

Original itemized receipts with proof of payment required. Attach a spreadsheet for additional details. Refer to Section 2C 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	_____

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

2C. 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. 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 _____
Total Meals \$ _____ Date: _____ # of People _____

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

2D. 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 will require exceptional approval.

Rental Car \$ _____ Gas Expense \$ _____

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

2E. Storage (Up to 90 days) – charged incurred before and after transit \$ _____ **Total of Storage (2E) \$ _____**

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

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 \$ _____

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

3C. Vehicle Transport - Driven, Employee drives personal vehicle instead of flying.

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 G-28 Travel Regulations.

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

Mileage rate for personal vehicle reimbursed at the rate published in the UC G-28, Appendix A.

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

Pet transportation: \$ _____ Type of pet(s) – domesticated pets only: _____

Sub-Total Transport Expenses - (3C) \$ _____

TOTAL EXPENSES, SECTION 3 - (Total of 3A-3C) \$ _____

SECTION 4: Relocation Expenses

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

4B. Lodging during Final Move

Employee drives personal vehicle instead of flying. *Attach the original itemized receipts with the 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
		2700					
		2700					
		2700					
		2700					

Employee should be aware all moving household and personal removal expense reimbursements are taxable and 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: _____

NOTES:

- Employee and departments are responsible for submitting the original receipts with *proof of payment*.
- Include the signed OFFER LETTER & if applicable the signed exceptional approval memo/letter.
- Qualified moving expense reimbursements will be processed (reported on the employee's W-2 form) within the same calendar year in which the expenses were incurred.

REFERENCES:

- Accounting web page: <https://accounting.uci.edu/moving>
- SMG Move Reimbursement Regents Policy 7710: http://policy.ucop.edu/files/smg-docs/smg_move_reimburse.pdf