

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 [UC Policy G-13](#) for list of allowable expenses for non-academic titles (MSP and PSS)
[APM 560](#), [APM 561](#), [APM 550](#) policies for eligible Academic Personnel
[Regents Policy 7710 Senior Management Group Moving Reimbursement](#)

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.
- If reimbursing more than 50% of personal move expenses for eligible Academic appointments include the signed exceptional approval letter.
- If reimbursing an Academic title not eligible per the APM-560 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 _____

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 Only (SMG): Pre-Move House Hunting Expenses.

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

Employee Name _____ Spouse/Partner _____

Senior Management Group Only (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 & 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 _____
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 _____
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 – charged incurred before and after transit \$ _____ **Total of Storage (2E) \$ _____**

Total Expenses, Section 2 - (Total of 2A-2E) \$ _____

SECTION 3: Final Move

3A. Third Party Expenses – Moving company, storage, etc., for auditing & reporting purposes only.

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 of time normally required to travel such a distance.

Attach the original itemized receipts with the proof of payment with this form for auditing and reporting purposes.

Moving Company Name: _____ Invoice(s): _____

Household move total: \$ _____ Cost of shipping personal vehicle(s): \$ _____

100% Lab, library, office move: \$ _____ Storage charges incurred in transit: \$ _____

Total Final Move Expenses - (Total of 3A) \$ _____

SECTION 4: Employee Reimbursable Expenses

4A. Transportation- Employee out of pocket expenses.

Employee drive 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 en-route, must be in accordance with UC G-28 Travel Regulations.

Car mileage: _____ Total dollar amount for mileage: \$ _____ Car license plate #: _____

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: _____

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 drive 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: _____

Other Expenses: \$ _____ Explanation: _____

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

Total Employee Reimbursable Expenses - (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

Total Move & Relo reimbursements will be subject to applicable withholding and will be processed through payroll.

Approval Signature: _____ Date: _____

Approver Name: _____ 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.
- Reimbursements for eligible academic appointments are allowed at 50% of actual moving expenses.
- 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://www.accounting.uci.edu/moving/index.html>
- G-13 Move & Relocation Policy (applies to MSP and PSS): <http://policy.ucop.edu/doc/3420347/BFB-G-13>
- SMG Move Reimbursement Regents Policy 7710: http://policy.ucop.edu/_files/smg-docs/smg_move_reimburse.pdf
- APM 560: 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 550-0: https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-560.pdf