

UC IRVINE RELOCATION EXPENSE FORM
Managers and Senior Professionals (MSP) and
Professional and Support Staff (PSS) Personnel

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

References

[UC Policy G-13](#) for list of allowable expenses for non-academic titles (MSP and PSS)

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 _____

Immediate Family Member's Full Names

Name _____	Relationship _____
Name _____	Relationship _____
Name _____	Relationship _____
Name _____	Relationship _____
Name _____	Relationship _____
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: Expenses

2A. Temporary Housing & Groceries (Up to 30 days)

Policy: Temporary housing & groceries, 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 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. 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 (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 vehicle, considered an upgrade will require exceptional approval.

Rental Car \$ _____ Gas Expense \$ _____

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

2D. Storage (Up to 30 days) charged incurred before and after transit \$ _____ **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 \$ _____

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

3C. Vehicle Transport - Driven, Employees 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 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. 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

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

4B. Lodging during Final Move

Employees drive personal vehicle instead of flying.

Attach the lodging 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	_____
# 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

Employee 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: _____

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/>
- G-13 Move & Relocation Policy (applies to MSP and PSS): <http://policy.ucop.edu/doc/3420347/BFB-G-13>