

RELOCATION EXPENSE FORM

Refer to UC Policy APM-560 for list of allowable expenses for academic titles, UC Policy G-13 for list of allowable expenses for non-academic titles (MSP and PSS) and Policy 2.800 Senior Management Group Moving Reimbursement.

Refer to the instructions/notes page for links to the above policy's via web.

Department is required to submit *all receipts* of reimbursable final moving expenses for auditing purposes.

Incomplete forms will be returned to department contact.

Employee Name	_____	Hiring Department	_____
Payroll Title	_____	Department Contact	_____
Start Date	MM/DD/YY	Dept. Contact Phone	555-555-1212
EID	_____	Dept. Contact Email	_____

Section 1: Time & Distance Requirements

1) Distance Requirement: _____ Yes _____ No

Is the employee's new principal place of work at least 50 miles farther from the employee's old residence than was his/her former principal place of work?

2) Time Requirement: _____ Yes _____ No

Is it anticipated that the employee will 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

Were the individual's moving expenses incurred within one year from his/her start date?

4) Have *all three* of the above requirements been met? _____ Yes _____ No

"YES" Complete sections 2-4 of the Relocation Expense Form

"NO" Total reimbursements related to the relocation will be *taxable* and must therefore be paid through the **payroll** system on a **MOV - Dos Code**.

Section 2: TAXABLE EXPENSES & THIRD PARTY VENDOR PAYMENTS

- ✓ (Taxable Expenses): Expenses which were paid through the EDB/Employees payroll department due to IRS Tax withholding requirements. Provide taxable expenses information for auditing purposes.
- ✓ (Third Party): Please list all expenses which were paid directly to a 3rd party vendor (eg., moving company, car transportation company, UC Travel Center).

2A. Pre-Move House Hunting Expenses: (Taxable Expense)

UC Policy (Academic/Non-Academic Title): Actual expenses of employee and spouse in connection with post-offer acceptance trips (househunting) is allowable but all expenses associated with the trip are **TAXABLE** to the employee and must be paid through the **payroll** system for proper tax withholding.

Employee must incur all travel cost due to tax reporting obligations.

Airfare paid by employee: \$ Taxable

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

Other Pre-Move House Hunting Expenses (Taxable Expenses)

Rental Car:	\$ _____	Meals:	\$ _____	Refer to G-28 for mileage rates
Ground Transportation:	\$ _____	Personal Vehicle:	\$ _____	
Lodging:	\$ _____	Miscellaneous Expenses:	\$ _____	

2B. Third Party Expenses

Moving company name:	_____	Invoice(s):	_____
Bruin Buy order(s):	_____	Total Bruin Buy dollar amount:	\$ _____
Household move total:	\$ _____	Cost of shipping personal vehicle(s)	\$ _____
100% lab, library, office move:	\$ _____	Storage charges incurred in transit only:	\$ _____
Storage charges incurred before and after the transit: (Academic Title Only: Require Vice Chancellor Prior Approval)	\$ _____		Taxable Expense _____

2C. Transportation Expenses

Airfare paid through UC Travel Center: \$ _____	PTA Number: PTA0000000 _____
Names of Travelers	
Employee _____	Spouse/Partner _____
Child 1 _____	Child 2 _____
Child 3 _____	Child 4 _____
Other (explain) _____	Other (explain) _____
Rental Car (while primary vehicle is being shipped),(Academic Titles Only: Requires Vice Chancellor Prior Approval) : \$ _____	Taxable Expense _____

2D. Meals During Final Move (Taxable Expense)

Meal & IE Policy: Travelers are required to claim actual cost not to exceed a cap of \$64 per day for travel 24 hrs or more with overnight accommodations. No exceptions in exceeding the daily cap. M&IE cap shall not be treated as a per diem.

Total meals:\$ _____	Date: MM/DD/YY _____	# 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: _____

2E. Temporary Housing: (Academic Titles Only: Require Chancellor Prior Approval)

- ✓ Policy: Temporary housing in the new work area is taxable to the employee.
- ✓ Refer to appropriate policy for the number of allowable days.
- ✓ Original itemized hotel receipts required.

Policy: Temporary housing in the new work area is taxable to the employee

Number of Nights _____	Check in Date: MM/DD/YY _____	Check out Date: MM/DD/YY _____	Rm+tax (Total):\$ _____	# of people: _____
Number of Nights _____	Check in Date: MM/DD/YY _____	Check out Date: MM/DD/YY _____	Rm+tax (Total):\$ _____	# of people: _____
Number of Nights _____	Check in Date: MM/DD/YY _____	Check out Date: MM/DD/YY _____	Rm+tax (Total):\$ _____	# of people: _____

Section 3: Final Move (Non-Taxable Expenses)

- 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.
- ✓ List expenses that need to be reimbursed to the employee for final move only (Non-Taxable Expenses).
 - ✓ Attach the original receipts with this form for reimbursement and audit purposes.

3A. Transportation (Expenses paid out-of-pocket by employee)

Airfare paid by employee: \$ _____	
Employee _____	Spouse/Partner _____
Child 1 _____	Child 2 _____
Child 3 _____	Child 4 _____
Other (explain) _____	Other (explain) _____

3A continued. Transportation (Expenses paid out-of-pocket by employee)

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

(Refer to G-28 Appendix A for IRS established mileage rate for relocation)

Moving truck rental:\$ _____ Moving truck rental "FUEL":\$ _____ Ground transportation \$ _____

Pet Transportation: \$ _____ Type of pet(s): **Domesticated Pets ONLY**

Total Final Move Transportation Expenses:(total all of 3A) \$ _____

3B. Lodging (if new employee drove instead of flying)

Rm+tax (ea.nt):\$ _____ Date: MM/DD/YY # of people: _____ Rm+tax (ea.nt):\$ _____ Date: _____ # of people: _____

Rm+tax (ea.nt):\$ _____ Date: _____ # of people: _____ Rm+tax (ea.nt):\$ _____ Date: _____ # of people: _____

Rm+tax (ea.nt):\$ _____ Date: _____ # of people: _____ Rm+tax (ea.nt):\$ _____ Date: _____ # of people: _____

Total Lodging Expenses:(total all of 3B) \$ _____

3C. Miscellaneous Expenses

Tolls: \$ _____ Parking: \$ _____

Other Expenses: \$ _____ Identify: _____

Other Expenses: \$ _____ Identify: _____

Other Expenses: \$ _____ Identify: _____

Total Miscellaneous Expenses:(total all of 3C) \$ _____

3D. Final Move Reimbursable Expenses (Total 3A,3B and 3C ONLY) \$ _____

Section 4: Accounting Information:

4A: Bruin Buy/PAC Order

Bruin Buy/PAC Order (object code 2700 only) 0000-T-XX000 Bruin Buy/PAC Order: \$ _____ Must equal 3D

4B: Full Accounting Unit (Required for Academic Employees ONLY)

LOC	ACCOUNT	CC	FUND	PROJECT	SUB	OBJECT	SOURCE	REFERENCE	AMOUNT
						2700			
						2700			
						2700			
						2700			

Approval Signature: _____ Date: _____

Approver Name: _____ Approver Title: _____

Completed form, copy of offer letter and required receipts must be routed to the following:
Academic Tittles: **Dean's Office**
Non-Academic Tittles: **Travel Accounting**

Instructions for Completing the Form

Section 1: IRS Time & Distance Requirement

Section 2: Taxable Expenses & Third Party Vendor Payments - For AUDITING and REPORTING purpose's only.

* Complete 2. A (Pre-Move Househunting Expenses). 2.B (Third Party Moving Expenses) 2.C (Transportation) if expenses were paid directly to a third party 2.D (Meals - Final Move) 2.E (LODGING - Temporary Housing) expenses to be paid through EDB/Employees payroll department for tax withholding.

Section 3: For Final Move (non-taxable) - Reimbursable expenses.

* Complete 3.A (TRANSPORTATION), 3.B (LODGING) and 3.C (MISCELLANEOUS) for any reimbursable expenses to the new appointee, 3.D (Total Reimbursable Expenses (Non-Taxable).

Section 4: Accounting Information for Total reimbursable expenses

* 4.A (Bruin Buy order - Class Order T and Object Code 2700)

* 4.B (Full Accounting Unit) - **Required for academic reimbursements**

Notes

- * Place the order number on the form (top, right corner) and on section 4A
- * Complete one Relocation Expense form per move.
- * Departments are responsible for submitting the original receipts in case of audit.
- * Receipts: Academic departments should check with the Dean's Office for internal policy
- * Attach a copy of the OFFER LETTER.
- * **Departments are responsible for using the same account number on the Relocation Expense form as that used on the Purchase Order. (L & S has a different procedure)**
- * 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:
 - * APM-560 (Academic Titles) <http://www.ucop.edu/acadadv/acadpers/apm/apm-560.pdf>
 - * G-13 (MSP/PSS Titles) <http://www.ucop.edu/ucophome/policies/bfb/g13.html>
 - * Policy 2.800 SMG Moving Reimbursement http://atyourservice.ucop.edu/employees/policies_employee_labor_relations/personnel_policies/smg_move_reimburse.pdf
 - * UCLA Purchasing: <http://www.purchasing.ucla.edu>
 - * UC Travel Center: <http://www.travel.ucla.edu>

PRIVACY NOTIFICATION

FEDERAL

Pursuant to the Federal Privacy Act of 1974, you are hereby notified that disclosure of your Social Security number is mandatory. Disclosure of the Social Security number is required pursuant to section 6011 and 6051 of subtitle F of the Internal Revenue Code and with Regulation 4, Section 404.1256 Code Federal Regulations, under Section 218, Title II of the Social Security Act, as amended. The social security number is used to verify your identity. The principal uses of the number shall be to report (1) Federal and State income taxes withheld, (2) Social Security contributions, (3) State unemployment and worker's Compensation earnings, and (4) earnings and contributions to participating retirement systems.

STATE

The State of California Information Practices Act of 1977 (effective July 1, 1978) requires the University to provide the following information to individuals who are asked to supply information:

RELOCATION EXPENSE FORM

Individuals who are asked to supply information:

The principal purpose for requesting the information on this form is for reimbursement of expenses and for miscellaneous payroll and personnel matters, such as, but not limited to withholding of taxes. University policy and State and Federal statutes authorize the maintenance of this information. Furnishing all information requested on this form is mandatory-- failure to provide such information will delay or may even prevent the action for which the form is being filled out. Information furnished on this form may be used by various University departments for payroll and personnel administration, and will be transmitted to the Federal and State governments as required by law. Individuals have the right to review their own records in accordance with staff personnel policies, collective bargaining agreements, and Academic Personnel Manual Section 160. Information on these policies can be obtained from campus or Office of the President Staff and Academic Personnel Offices.

The offices responsible for maintaining the information contained on this form are: Office of the President and Campus Corporate Finance.