MOVING/RELOCATION EXPENSE REIMBURSEMENT

Presented by:
Tax Department
Arrangements with Payments of Moving Companies

- Upon receipt of the letter of acceptance of employment from the new employee, the responsible departmental or college/division administrator shall provide to the new employee a copy of MAPP 02.02.05 with specific information on University contracts with moving companies. Refer to the list of UH Pre-Approved Moving Companies posted on the Tax website, or contact the Purchasing Department for more information. [http://www.uh.edu/finance/TaxInformation/PDF_files/Moving%20Companies.pdf](http://www.uh.edu/finance/TaxInformation/PDF_files/Moving%20Companies.pdf)

- The employee may contract directly with a self-service or full-service moving company or request the responsible University department issue a PO to the moving company and pay with a PO voucher. The payment to the moving company is taxable to the employee. The voucher should be routed through tax workflow for review and approval. The employee will be responsible for paying any amount that exceeds authorized moving expenses.

- If the new employee seeks reimbursement for out-of-pocket moving expenses, receipts must be provided to the responsible department no later than 60 days, after the expense has been incurred.
Moving/Relocation Expenses
Reimbursement Policy Overview

- Out-of-pocket moving expenses for house-hunting, temporary quarters (lodging), storage, and the cost of transporting personal effects for the new UH employee and members of their household to a new home, are taxable to the employee. These expenses should be reimbursed in the Concur Travel Management System. Other UH campuses not using the Concur system can process the moving relocation payments/reimbursements through Accounts Payable. Please note that payments for moving and relocation expenses are NOT allowed on the departmental Travel Card.

- Employee can get reimbursement for moving expenses while in transit, up to the first day of arrival to new job location. Additional expenses (other than temporary quarters) is not allowed.
# Required Moving and Relocation Documents in Concur

<table>
<thead>
<tr>
<th>Travel Request</th>
<th>Expense Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Upload to the Travel Request the Offer Letter showing the allowance for moving expenses</td>
<td>1. Authorization for Moving and Relocation Expenses (Addendum A) and Offer Letter <a href="http://www.uh.edu/finance/pages/tax_info.htm">http://www.uh.edu/finance/pages/tax_info.htm</a></td>
</tr>
<tr>
<td></td>
<td>3. Itemized receipts (including meals while moving); use Google Maps in Concur to document mileage</td>
</tr>
<tr>
<td></td>
<td>4. Taxable Payments or Reimbursements to Employee Form (Exhibit B) <a href="http://www.uh.edu/finance/pages/forms.htm">http://www.uh.edu/finance/pages/forms.htm</a></td>
</tr>
</tbody>
</table>
Be sure to include the “Arrival Date” to new job location on the Addendum A.
Creating a Concur Travel Request for Moving Expenses

Request Header

Note: Create a Travel Request for House hunting expenses and another one for the actual Relocation expenses

For Primary Purpose of Travel, choose "Househunting expenses" or "Moving expenses (not househunting)". Either one will work. You can change it on the Expense Report, if needed.
Select "New Employee Moving Expenses" as the Travel Type.
Complete the remaining fields on the Request Header and click Save. You will be taken to the Segments tab.
Enter the moving expense allowance by clicking the “Incidentals/Other” icon.
Attach the new employee’s offer letter, which should show that moving expenses will be paid/reimbursed up to a certain dollar amount.
Concur Travel Request – Approval Flow

Request 36AF

Document ID: Smith,J-120115-Houston
Purpose/Benefit: Moving expenses for Jane Smith

- Request Header
- Segments
- Expenses
- Approval Flow
- Audit Trail

**Enter an asterisk (*) to pull up a list of certifying signatories, if there is more than one to choose from. Select a certifying signatory.**

Click Submit Request to submit into workflow.

**Certifying Signatory Level 2:**
- [List of signatories]
  - Search Approvers By
Creating a Concur Expense Report for Moving

In the Concur main page, click on “Authorization Requests” in the header or in the My Tasks section. Then look for a Travel Request for which you will be creating an Expense Report. The Travel Request must be fully approved before you create an Expense Report.
Select the appropriate Travel Request and click on the expense hyperlink.

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Request ID</th>
<th>Status</th>
<th>Request Dates</th>
<th>Date Submitted</th>
<th>Total</th>
<th>Approve</th>
<th>Remain</th>
<th>Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveler: L Paris 04/01/15</td>
<td>34LR</td>
<td>Approved</td>
<td>04/01/2015</td>
<td>04/01/2015</td>
<td>$4,200.00</td>
<td>$4,200.00</td>
<td>$4,200.00</td>
<td>Expense</td>
</tr>
</tbody>
</table>
On the Expense Report Header, change the Primary Purpose of Travel, if needed. “Househunting expenses” should be selected if ALL expenses for that Report are for househunting. Be sure to itemize all of the Househunting expenses. “Moving expenses (not househunting)” should be selected if ALL expenses for that report are for the actual move of the employee, household members, and household items. Create an Expense Report from the “House hunting Travel Request”, and create an Expense Report from the “Relocation Travel Request”.
Complete the following additional fields on the Expense Report Header. The answers below are only examples. Answer the questions correctly for each Expense Report.
Concur Expense Report Continued

- Click “Next” at the bottom of the Report Header page.
- Click “Cancel” on the Travel Allowance page (which is only used for state funds) to skip this page. Moving expenses are paid with local funds only.
- Select the appropriate Expense Types under “Moving Expense”. See next slide.
  - If “Househunting” is the primary purpose, all expenses will be coded as househunting. Be sure to add a comment as to what the expense is (i.e. airfare, lodging, meals, etc)
  - If “Moving expense (not househunting)” is the primary purpose, expenses will be coded as actual moving expenses in taxable expense account 56121.
### Expense Types

#### 06. Moving Expenses

- Airfare - Moving (Taxed)
- Gasoline - Any vehicle (Taxed)
- **House hunting All Expenses (Taxed)**
- Lodging Enroute including 1st Day Leave and Arrive (Taxed)
- Meal for Employee and Family (Taxed)
- Mileage (Taxed)
- Moving Company - Reimburse Employee (Taxed)
- Other Moving Expenses (Taxed)
- Packing Supplies - Boxing, Tape, etc. (Taxed)
- Parking - Moving (Taxed)
- Rental Truck/Van/Car - Moving (Taxed)
- Shipping Expenses - UPS, FedEx, USPS, etc. (Taxed)
- Storage, Temp (including PODS) (Taxed)
- Taxi - Moving (Taxed)
- Tolls - Moving (Taxed)
- Train - Moving (Taxed)
- Vehicle Transport (Taxed)
- Visa Application Fee (Taxed)

Choose the appropriate "Expense Type" for moving relocation expenses. Be sure to choose expense types from the "06. Moving Expenses" section, not regular travel.

**Note:** House hunting expenses should be coded under "House hunting All Expenses".

Once you click on the expense type, the appropriate account code associated with that expense type will be populated on the Expense Report. For more information, refer to the “Creating an Expense Report from a Travel Request” posted on the Finance website under Finance Departments – Accounts Payable (Travel).
Concur Expense Report Continued

- Attach required documents to Expense Report
  1. Authorization for Moving and Relocation Expenses (Addendum A) and Offer Letter
  2. Itemized receipts (including meals while moving); use Google Maps in Concur to document mileage
  3. Taxable Payments or Reimbursements to Employees Form (Exhibit B)

- Submit Expense Report into workflow
54806  Direct Payment to Moving Company (Taxable) – Payment made directly to moving company for moving the personal effects and household goods of a new staff or faculty member while moving to their UH assignment. To be processed on a PO Voucher and routed through tax workflow for approval.

56122  House-hunting Travel (Taxable) – Prospective and new employee travel expenses while house hunting. Cost of one trip of up to one week in length for the employee and members of the household. This refers specifically to the travel costs associated with a new employee and household members looking for a house or apartment in the vicinity of the new place of employment.

56121  Directly related expense (Taxable) - New employee (and members of household) travel while moving to their UH assignment. This includes short-term and long term storage, temporary quarters, lodging, airfare, shipping supplies, moving company, shipment of vehicles, moving truck or car rental gasoline, car rentals (used for moving purposes only), PODS, transportation costs to and from airports. If traveling by personal car, includes mileage, or the actual cost of transportation, such as gas, oil, parking fees, and tolls. Refer to the IRS Mileage Rate Schedule: [http://www.uh.edu/finance/pages/tax_info.htm](http://www.uh.edu/finance/pages/tax_info.htm)

52811  Freight / Transportation (Non-Reportable) – Freight in and out, delivery, air express, hot shot, armored car, drayage, towing, shipping, detention of a freight haul. Not moving expenses or travel. Should be used for moving labs, offices where allowed. These payments may be processed on a voucher.
# Who’s Who

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Contact information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alma Villarreal</td>
<td><a href="mailto:avillare@central.uh.edu">avillare@central.uh.edu</a></td>
</tr>
<tr>
<td>Tax Assistant II</td>
<td>713-743-8608</td>
</tr>
<tr>
<td>Elizabeth Giron</td>
<td><a href="mailto:egiron@central.uh.edu">egiron@central.uh.edu</a></td>
</tr>
<tr>
<td>Foreign National Tax</td>
<td>713-743-8987</td>
</tr>
<tr>
<td>Specialist II</td>
<td></td>
</tr>
<tr>
<td>Keith Gernold</td>
<td><a href="mailto:kgernold@central.uh.edu">kgernold@central.uh.edu</a></td>
</tr>
<tr>
<td>Tax Director</td>
<td>713-743-8710</td>
</tr>
</tbody>
</table>