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/administration-finance/tax-information/moving-and-relocation/moving-companies.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

Travel Request	Expense Report
1. Upload to the Travel Request the Offer Letter showing the allowance for moving expenses	1. Authorization for Moving and Relocation Expenses (Addendum A) and Offer Letter http://www.uh.edu/administration-finance/tax-information/moving-and-relocation/addendum-a.pdf 3. Itemized receipts (including meals while moving); use Google Maps in Concur to document mileage 4. Taxable Payments or Reimbursements to Employee Form (Exhibit B) http://www.uh.edu/administration-finance/tax-information/moving-and-relocation/exhibit-b.pdf

Be sure to include the "Arrival Date" to new job location on the Addendum A

ADDENDUM A
Authorization for Moving and Relocation Expenses

Date:_____

Department and College/Division_____

Name of New Employee_____

Moving from_____Mileage Involved_____

Date of Acceptance of UH Employment_____

UH Employment Start Date_____

Arrival date to new job location (during relocation, not house hunting) _____

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

Concur Travel Request – Request Header Continued

Concur Travel Request – Request Header Continued

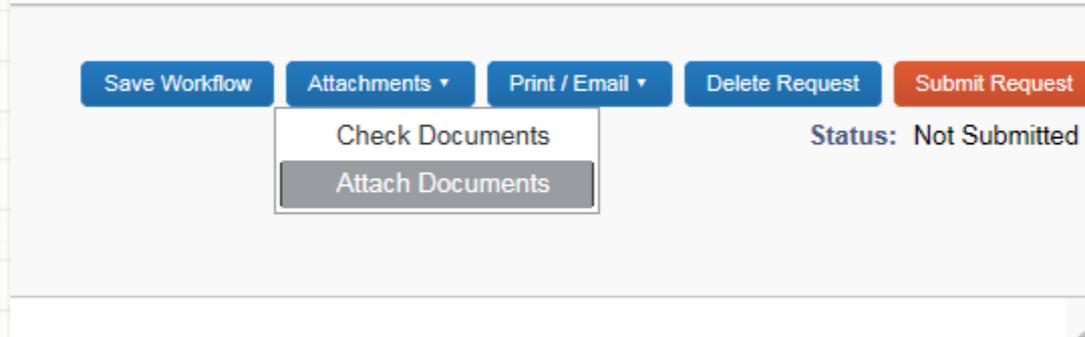Complete the remaining fields on the Request Header and click Save. You will be taken to the Segments tab.

Concur Travel Request - Segments

Enter the moving expense allowance by clicking the "Incidentals/Other" icon.

Concur Travel Request - Attachments

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 |

Supervisor UH:

Bartlett, Raymond S.

(this step may be skipped)

Certifying Signatory Level 2:

| * | × |

Samuels, Juanita M. (jsouth@uh.edu)
Employee ID: 0120161
Logon ID: jsouth@uh.edu

Hunter, Le'che R. (lhunter3@uh.edu)
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Garza, Linda M. (lmgarza@uh.edu)
Employee ID: 0084199
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| Search Approvers By | ∨ |

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.

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.

Concur Expense Report Continued

Select the appropriate Travel Request and click on the expense hyperlink.

Concur Expense Report Header

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".

Concur Expense Report Header Continued

Complete the following additional fields on the Expense Report Header. The answers below are only examples. Answer the questions correctly for each Expense Report.

Traveler is BOTH a non-employee and a foreign national.	All receipts submitted within 60 days after trip or moving exp.
(1) No	(2) Yes

Is this for Department Travel Card charges?	If for a Department Travel Card, enter the last 4 digits	If for a Department Travel Card, enter the Request ID number.
(2) No	0	

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

Note: Househunting 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

Moving and Relocation Accounts

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/administration-finance/tax-information/moving-and-relocation/irs-mileage-rates.pdf

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

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