



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

# 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**

**Request**

Document ID:  
Purpose/Benefit:

Request Header | Segments | Expenses | Approvals

Document ID 

Purpose/Benefit

Business Unit

Chartfield1

Will any travel cost be paid by a non-UH third party?

Primary Purpose of Travel

- Conference, workshop, training
- Contracted services to UHS (paid a fee)
- Federal government meeting
- Househunting expenses**
- Moving expenses (not househunting)
- Recruit employees
- Recruit students
- Research
- State government meeting
- Student field trip
- Study abroad trip
- Team competition
- UHS Board of Regents meeting
- Voluntary services to UHS (not paid a fee)
- Whatever is not listed above (describe in Comments)

Traveler Type

Number of Person

Type

% of travel co

?

*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.*

# Concur Travel Request – Request Header Continued

Employee Travel in Texas (Not Student Recruiting)

Employee Travel Outside TX, but Inside US, Canada, or Mexico

Employee Travel Outside US, Canada, and Mexico

Employee Travel to Recruit Students (All Destinations)

**New Employee Moving Expenses**

Participant Cost Travel

Prospective Employee Travel

Prospective Student Travel

Regent Travel in Texas

Regent Travel Outside Texas

Student Field Trip in the US

Student Study Abroad Travel

Student Team Competition

Student Travel (Not Field Trip, Study Abroad, Competition)

Travel for a Consultant (Paid a Fee)

Travel for Lecturer/Artist (Paid a Fee)

Cancel Save Print / Email Delete Request

Status

Traveler Type: Employee

Travel Start Date

Travel End Date

Duration (Days): 0

Purpose/Benefit

UH Request Policy

# Concur Travel Request – Request Header Continued

Request

Document ID:  
Purpose/Benefit:

Request Header Segments Expenses Approval Flow Audit Trail

Document ID 

Primary Purpose of Travel

Purpose/Benefit

Enter Purpose/Benefit including the full name of the new employee

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

# Concur Travel Request - Segments

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment  
CLICK ICON TO CREATE SEGMENT

**1. Click on Incidentals/Other symbol**

**Incidentals/Other** Amount:

**2. Enter maximum moving expense amount and description**

City:

Detail:

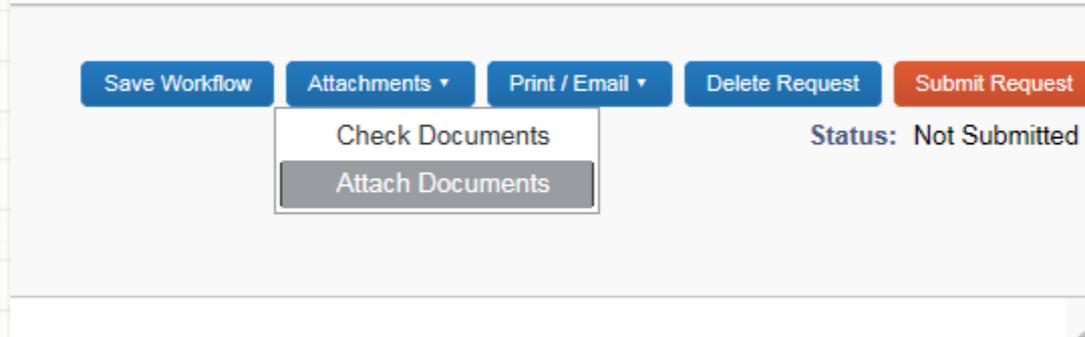
Date:  At:

Comment:

**3. Click Save**

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

# Concur Travel Request - Attachments



The screenshot shows a user interface for a travel request. At the top, there are five buttons: "Save Workflow" (blue), "Attachments" (blue with a dropdown arrow), "Print / Email" (blue with a dropdown arrow), "Delete Request" (blue), and "Submit Request" (orange). Below the "Attachments" button, a dropdown menu is open, showing two options: "Check Documents" and "Attach Documents" (highlighted in grey). To the right of the buttons, the text "Status: Not Submitted" is displayed.

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.

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)  
Employee ID: 0086900  
Logon ID: lhunter3@uh.edu  
Garza, Linda M. (lmgarza@uh.edu)  
Employee ID: 0084199  
Logon ID: lmgarza@uh.edu  
Yurus, Sakurako H. (shyurus@central.uh.edu)  
Employee ID: 0127173  
Logon ID: shyurus@central.uh.edu

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.

The screenshot shows the Concur interface for the University of Houston System. The top navigation bar includes 'CONCUR', 'Requests', 'Travel', 'Expense', 'Reporting', and 'App Center'. The user is identified as 'Linda'. The main dashboard features several key metrics: 26 Authorization Requests, 08 Available Expenses, 37 Open Reports, and 09 Cash Advances. A red arrow points to the '26 Authorization Requests' tile. Below the navigation bar, there are sections for 'TRIP SEARCH' (with an 'Air/Rail Search' form), 'ALERTS' (with a notification about TripIt Pro), 'COMPANY NOTES' (with a 'Welcome to the UH System Travel and Expense Online Tool' message), and 'MY TASKS'. The 'MY TASKS' section contains three tiles: '35 Open Requests' (with a red arrow pointing to the 'Authorization Requests' link and the number '26'), '08 Available Expenses' (with a link to 'DOUBLETREE SOUTHPARK...'), and '37 Open Reports' (with a link to 'Traveler, L Dallas060115 \$700.00 Returned').

# Concur Expense Report Continued

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

The screenshot displays the Concur interface for managing requests. The top navigation bar includes 'CONCUR', 'Requests', 'Travel', 'Expense', 'Reporting', and 'App Center'. Below the navigation bar, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main heading is 'Active Requests (27)'. There are two buttons: 'Delete Request' and 'Close/Inactivate Request'. A search bar with 'Request Name' and 'Begins With' dropdowns and a 'Go' button is present. Below the search bar is a table with the following data:

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remaint...	Action
<input type="checkbox"/>	Traveler, L Paris 04/2015 Attending the international technology conference for obtaining information and networking.	34LR	Approved	04/01/2015 04/08/2015	06/04/2015	\$4,200.00	\$4,200.00	\$4,200.00	<a href="#">Expense</a>

# Concur Expense Report Header

The screenshot shows the 'Primary Purpose of Travel' dropdown menu in the Concur Expense Report Header. The current selection is 'Conference, workshop, training'. The dropdown list includes the following options:

- Conference, workshop, training
- Contracted services to UHS (paid a fee)
- Federal government meeting
- Househunting expenses
- Moving expenses (not househunting)
- Recruit employees
- Recruit students
- Research
- State government meeting
- Student field trip
- Study abroad trip
- Team competition
- UHS Board of Regents meeting
- Voluntary services to UHS (not paid a fee)
- Whatever is not listed above (describe in Comments)

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.

(1) No

All receipts submitted within 60 days after trip or moving exp.

(2) Yes

Is this for Department Travel Card charges?

(2) No

If for a Department Travel Card, enter the last 4 digits

0

If for a Department Travel Card, enter the Request ID number.

## 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 1<sup>st</sup> 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:** 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

---

**Contact Name****Contact information**

**Maggie Zarazua**

Tax Assistant II

[mzarazua@central.uh.edu](mailto:mzarazua@central.uh.edu)

713-743-7740

**Alma Villarreal**

Foreign National Tax  
Specialist I

[avillare@central.uh.edu](mailto:avillare@central.uh.edu)

713-743-8608

**Keith Gernold**

Tax Director

[kgernold@central.uh.edu](mailto:kgernold@central.uh.edu)

713-743-8710