Moving Expenses Reimbursement

- What are the rules?
- Who is eligible?
- What could be reimbursable?
- What/How to submit?
Moving Expenses Reimbursement

What are the rules?

- IRS Publication 521
- State fiscal rules
- University policies and procedures
- Restrictions from your own department
- Restrictions from donors/sponsors
Moving Expenses Reimbursement

Who is eligible?

- An employee and his/her immediate family (spouse and dependents)
- Officer/ faculty/ exempt professional only
- Full-time/ the time (39-week) test/ distance test
- Letter of offer/ reimbursement agreement
Moving Expenses Reimbursement

What could be reimbursable?

- **House-hunting** — before actual move - **Taxable**
  
  Former Home $\leftrightarrow$ New Home

- **Actual Move** – **Non-Taxable**
  
  Former Home $\rightarrow$ New Home

- **Temporary Living** - **Taxable**
  
  Only in new home area
What Could Be Reimbursable?

- **House-hunting Trip(s)**
  - Transportation (air flight/mileage/fuel)
  - Taxi fare/ Parking fee
  - Lodging
  - Meals – Denver per diem
  - Car Rental

▲ All reimbursements in this part are **taxable** and subject to tax withholding.
What Could Be Reimbursable?

- **Actual Moving Trip**
  - Transportation (air flight/mileage/fuel)***
  - Driving/Shipping up to 2 automobiles***
  - Truck Rental***
  - Lodging (one day before/one day after/during the trip)***
  - Meals – Denver per diem
  - Storage/Insurance expenses while in transit***
  - Packing/Crating expenses***

▲ Reimbursements marked with “***” could be non-taxable if submitted within 90 days after incurring expenses.
What Could Be Reimbursable?

- **Temporary Living Expenses**
  -- in new home area only and up to 30 days
  - Lodging
  - Meals
  - Car Rental – if personal car not available

▲ All reimbursements in this part are **taxable** and subject to tax withholding.
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What to submit?

- Additional Pay Form
- MVN (for non-taxable) and/or MVT (for taxable reimbursement)
- House-hunting Taxable Expenses form (for taxable expenses paid directly by the university)
- Letter of offer/ reimbursement agreement
- Itemized receipts and proof of payment
- Unavailable Receipt (if applicable)
- Statement of moving related PO/SPO/Acard charges

- Please make sure all forms have proper signatures and authorization.
- Please be aware of the 90-day submission rule.
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How/Where to submit?

Your School Dean’s Office

SOM – Chris Scanlan (Dean’s Office); (303) 724-5366; Campus Box C290
SOM – Lisa Stanford (Dean’s Office); (303) 724-5372; Campus Box C290
Graduate School – Valerie Saltou (Postdoctoral Office); (303) 724-2930

Questions?

Kyla Jones (303) 315-2259
Diane Roche (303) 315-2254
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Helpful Links

Moving and Relocation Expense Reimbursement Policy
http://www.ucdenver.edu/faculty_staff/employees/policies/Policies%20Library/Fiscal/Moving.pdf

PBS Website for MVN, MVT, and House Hunting Forms
https://www.cu.edu/pbs/forms/#m

PBS Website for Additional Pay Form
https://www.cu.edu/pbs/forms/#a

Finance Website for Moving Unavailable Receipt Form
http://www.ucdenver.edu/about/departments/finance/Pages/Forms.aspx

PSC Website for Moving Companies
https://www.cu.edu/psc/purchasing/howtobuy/moving.htm