

# Moving/Relocation Expense Reimbursement

For questions:

Contact the Payroll & Tax Department

[hrpaytax@uh.edu](mailto:hrpaytax@uh.edu)

## 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 02.03.07](#) 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.
- 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 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/reimbursement 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
Upload to the Travel Request, the Offer Letter showing the allowance for moving expenses	<ol style="list-style-type: none"><li data-bbox="1156 629 2211 729">1. Authorization for Moving and Relocation Expenses (Addendum A) and Offer Letter.</li><li data-bbox="1156 743 2270 843">2. Itemized receipts (including meals while moving); use Google Maps in Concur to document mileage</li><li data-bbox="1156 858 2333 958">3. Taxable Payments or Reimbursements to Employee Form (Exhibit B)</li></ol>

### Form Links:

1. **Addendum A** - <https://uh.edu/office-of-finance/tax-information/moving-and-relocation/addendum-a-authorization-for-movingrelocation-expenses-revised-9-1-2022.pdf>
2. **Exhibit B** - <https://uh.edu/office-of-finance/tax-information/moving-and-relocation/exhibit-b-taxable-payments-reimbursement-to-employees-9-1-2022.pdf>

## Ensure that you include “Arrival Date” to new job location on the Addendum A

UNIVERSITY of **HOUSTON** SYSTEM

**ADDENDUM A**  
**Authorization for House-Hunting/  
Moving Relocation Expenses**

College/Division: \_\_\_\_\_ Department: \_\_\_\_\_

Employee: \_\_\_\_\_  
Name Title EMPL ID

Acceptance Date of Employment: \_\_\_\_\_ Employment Start Date: \_\_\_\_\_ Annual Salary: \$ \_\_\_\_\_

Departure Date: \_\_\_\_\_ **Arrival Date to new Job location:** \_\_\_\_\_  
(during relocation, not house hunting)

Moving from: \_\_\_\_\_ Mileage Involved: \_\_\_\_\_ Moving Company Name: \_\_\_\_\_

Cost Center to be charged: \_\_\_\_\_ Relocation Allowance: \$ \_\_\_\_\_ Attachments: \_\_\_\_\_  
(copy of offer letter)

# 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:

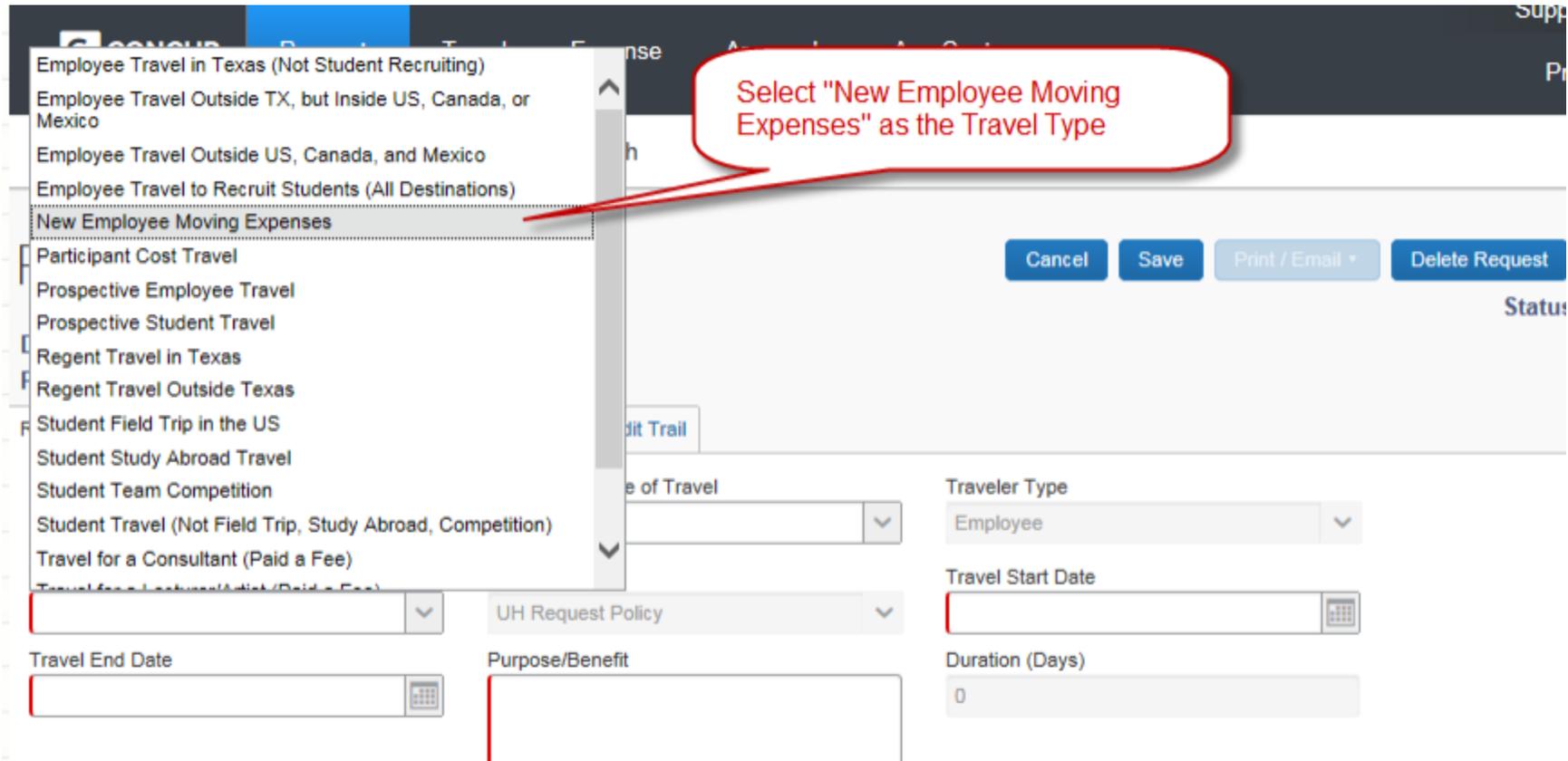
Type:

% 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 Contd..



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

Traveler Type: Employee

Travel Start Date

Travel End Date

UH Request Policy

Purpose/Benefit

Duration (Days): 0

Select "New Employee Moving Expenses" as the Travel Type

## Concur Travel Request - Request Header Contd..

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 redirected 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: 8,000.00 USD

2. Enter maximum moving expense amount and description

City:

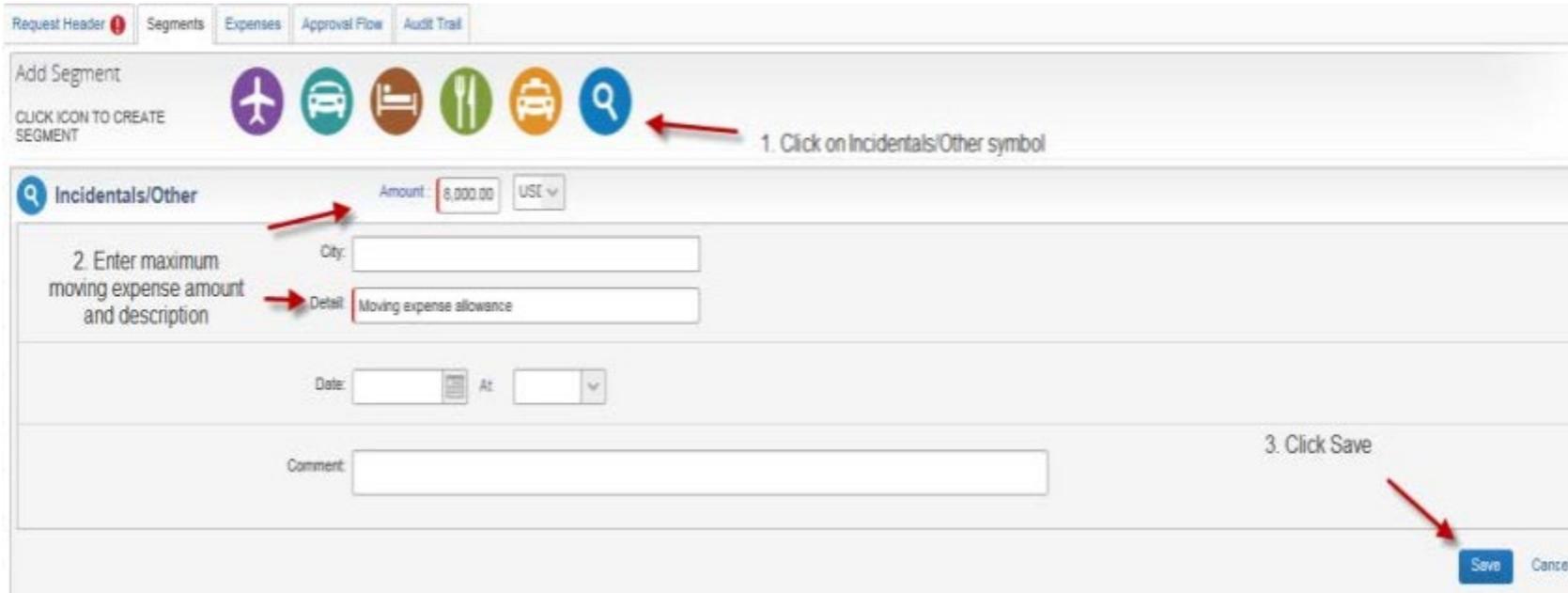
Detail:

Date:  At:

Comment:

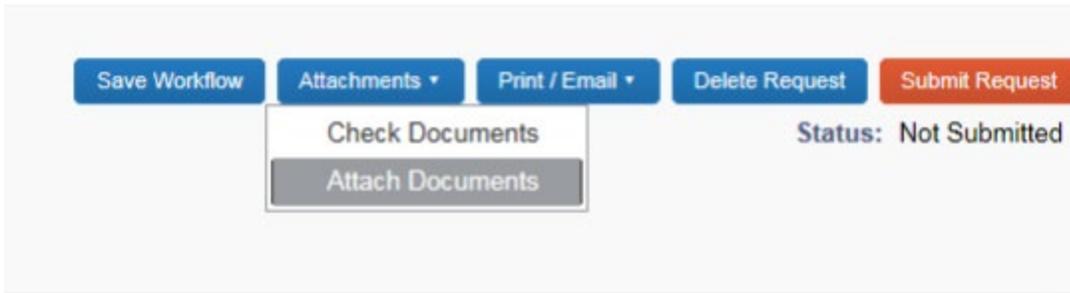
3. Click Save

Save Cancel



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

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.

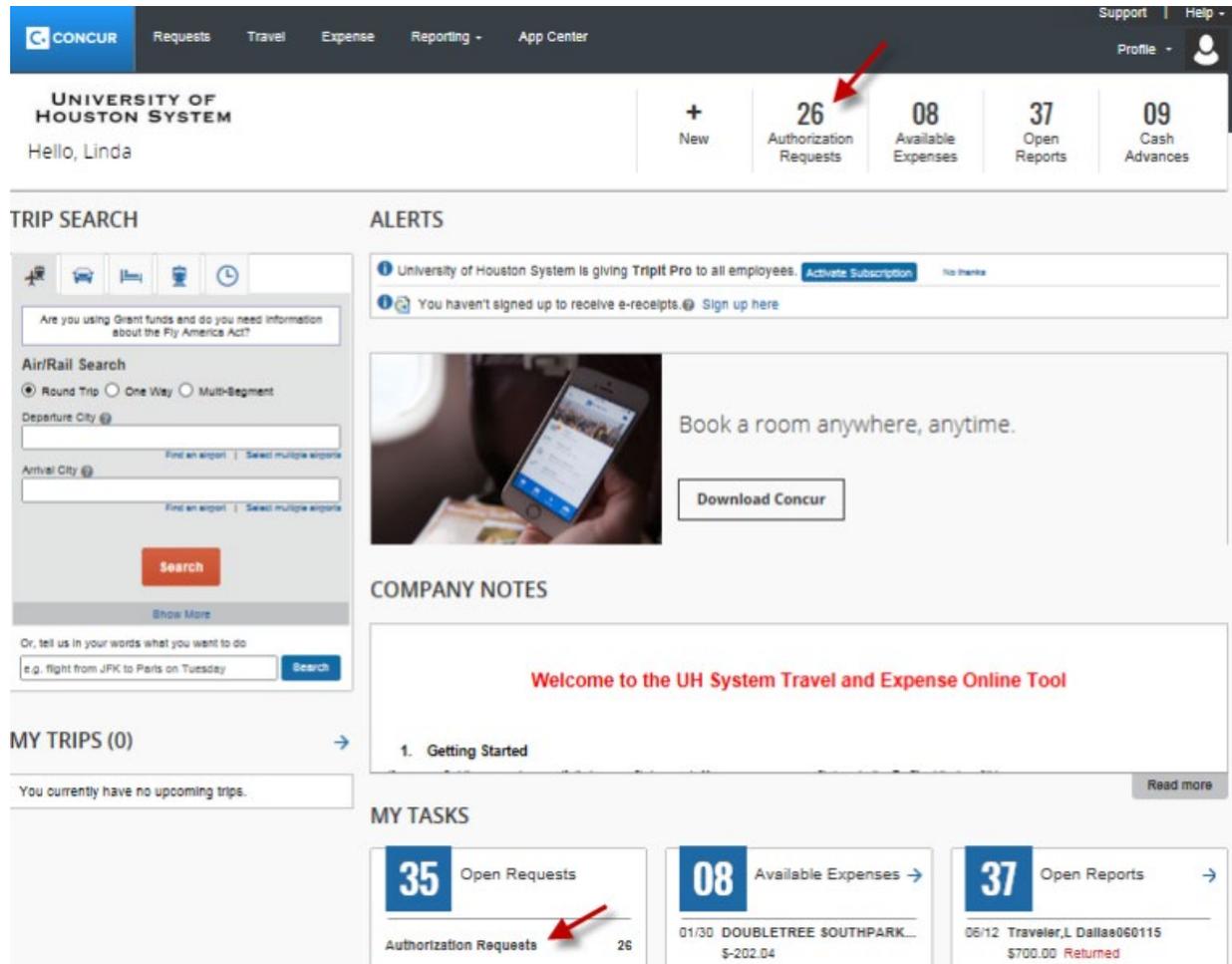
*(this step may be skipped)*

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: 0064199  
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



CONCUR Requests Travel Expense Reporting App Center Support Help

UNIVERSITY OF HOUSTON SYSTEM  
Hello, Linda

+ New 26 Authorization Requests 08 Available Expenses 37 Open Reports 09 Cash Advances

TRIP SEARCH

ALERTS

COMPANY NOTES

MY TASKS

35 Open Requests  
Authorization Requests 26

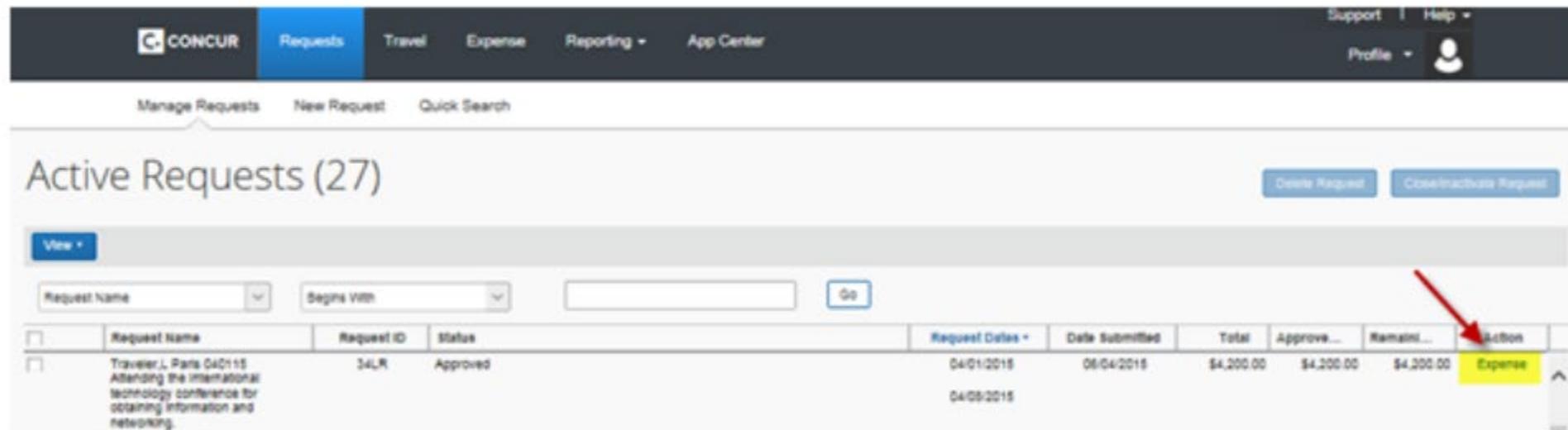
08 Available Expenses →  
01/30 DOUBLETREE SOUTHPARK... \$-202.04

37 Open Reports →  
06/12 Traveler, L Dallas060115 \$700.00 Returned

- 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 Contd..

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, there are options for 'Manage Requests', 'New Request', and 'Quick Search'. The main section is titled 'Active Requests (27)' and includes buttons for 'Delete Request' and 'Close/Inactivate Request'. A search bar with 'Request Name' and 'Begin With' filters is present. Below the search bar is a table of active requests.

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remain...	Action
<input type="checkbox"/>	Traveller, J. Paris 04/01/15 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

Primary Purpose of Travel	Business Unit
Conference, workshop, tr. x	(00730) University of Hou
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. “House hunting expenses” should be selected if ALL expenses for that Report are for house hunting.
- Be sure to itemize all of the House hunting expenses.
- “Moving expenses (not house hunting)” 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 Contd..

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

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

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 Header Contd..

- 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 “House hunting” is the primary purpose, all expenses will be coded as house hunting. Be sure to add a comment as to what the expense is (i.e. airfare, lodging, meals, etc.)
  - If “Moving expense (not house hunting)” 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

<b>54806</b>	<b>Direct Payment to Moving Company (Taxable)</b> – 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.
<b>56122</b>	<b>House-hunting Travel (Taxable)</b> – 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.
<b>56121</b>	<b>Directly related expense (Taxable)</b> - 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: Click <a href="#">here</a>
<b>52811</b>	<b>Freight / Transportation (Non-Reportable)</b> – 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.

## Tax Department Contacts

<b>Name &amp; Title</b>	<b>Contact Details</b>
<b>Kimberly Robinson</b> Asst. Controller (Payroll & Tax)	<a href="mailto:kdrobin7@Central.UH.EDU">kdrobin7@Central.UH.EDU</a> (713) 743-8799
<b>Taia Henry</b> Accountant IV (Foreign National/NRA Tax Specialist)	<a href="mailto:tahenry2@Central.UH.EDU">tahenry2@Central.UH.EDU</a> (713) 743-1539
<b>Phoebe Chau</b> Accountant III (Concur Travel Requests)	<a href="mailto:pchau@Central.UH.EDU">pchau@Central.UH.EDU</a> (713) 743-8764