

Moving Reimbursement Request Form

Name: _____

Date: _____

Colleague ID #: _____

Moved From: _____
(City, State)

To: _____
(City, State)

Susquehanna University's reimbursement arrangement qualifies as an accountable plan as defined by the Internal Revenue Service. Please see reverse side of this form for general requirements and reimbursable expenses.

House Hunting Expenses:

<ul style="list-style-type: none"> Lodging and transportation (airfare, rental car, mileage*, tolls, etc.) and should be limited to one trip, not to exceed three days. <i>House hunting expense reimbursements are taxable.</i> 		
Detailed Description of Expense	Date	Expense Amount
House Hunting Total		

Moving Expenses:

<ul style="list-style-type: none"> The reasonable cost of moving (packing, crating, and transporting) your household goods and personal effects The reasonable cost of traveling to your new home (mileage <u>or</u> fuel- mileage is reimbursed at the current IRS rate)* The cost of connecting and disconnecting utilities The cost of storing household goods for up to 30 days after moving from your former residence Lodging expenses in the area of your former home within one day after your furniture had been moved <p style="margin-left: 20px;"><i>Moving expense reimbursements are taxable as of 2018</i></p>		
Detailed Description of Expense	Date	Expense Amount
Moving Expenses Total		

Please complete this form, attach original receipts, and send to the Human Resources Office.

I have read the guidelines on the reverse side of this form and certify that items requested for reimbursement have been paid by me. Receipts have been attached for all items other than mileage and incidental expenses. I understand I am responsible for any moving expenses exceeding the approved moving allowance provided by Susquehanna University. I also understand expenses reimbursed to me by Susquehanna University cannot be claimed as a deduction for income tax purposes.

Employee's Signature _____

HR Office Approval: _____	Date: _____
Reimbursement Processed: _____	Date: _____
Reimbursed Amount: _____	
Notes: _____	
Payroll: SM _____ BW _____	

General Requirements:

- The move from your old residence must occur **within one year** after your first day of work
- Requests for reimbursement must occur **within 30 days** after the expense is incurred
- In general, the University does not provide advances for moving expenses; the employee will be reimbursed based on **original receipts** or documentation of **actual expenditures** via payroll no earlier than the employee's first pay
- The distance from your former home to the University must be **more than 50 miles** (there may be exceptions for employees required to live on campus as a condition of employment)
- If your employment lasts less than 39 weeks, the amount you received as a reimbursement may be considered taxable income

The following items ARE reimbursable for you and members of your household:

- The reasonable cost of moving (packing, crating, and transporting) your household goods and personal effects
- The reasonable cost of traveling to your new home
 - Mileage is reimbursed at the current IRS rate*
- The cost of connecting and disconnecting utilities
- The cost of storing household goods for up to 30 days after moving from your former residence
- Lodging expenses in the area of your former home within one day after you could no longer live in your former home because your furniture had been moved

The following items are NOT reimbursable:

- Any part of the purchase price of your new home
- Car tags or driver's license fees
- Meals purchased during the trip to your new residence
- Expenses of entering into or breaking a lease
- Expenses to move persons not considered to be dependents
- Home improvements to help sell your home
- Real estate taxes or other expenses
- Return trips to your former residence

***As of January 1, 2018, the current standard mileage rate for moving purposes is 18 cents per mile.**

House hunting expenses may include lodging and transportation (airfare, rental car, mileage, tolls, etc.) and should be limited to one trip, not to exceed three days. House hunting expense reimbursements are "non-qualified" and are therefore taxable. As of January 1, 2018, moving expense reimbursements are taxable also. House hunting expenses will be reimbursed via payroll no earlier than the employee's first pay.

Recordkeeping

It is important to maintain an accurate record of expenses you paid to move. You should save items such as receipts, invoices, cancelled checks, credit card statements, and mileage logs.

Note: If your moving expenses exceed the amount reimbursed by Susquehanna University, you may choose to file Form 3903. Please consult with your tax preparer or visit <http://www.irs.gov/publications/p521/ar02.html> for additional information.