

Relocation Expense Form

Section 1 - General Information	
Name: _____	Title: _____
New Address: _____	City: _____ State: ____ Zip Code: _____
Banner ID #: _____	Department Name: _____
Building Name: _____	Secretary: _____ Secretary Phone #: _____
Travel Point: from: _____	to: _____, New Jersey

* Section 2 - Pre Move / House Hunting Expense (For more information please visit: Relocation Expense Policy)			
Date	Item	Description of Expense	Amount

* Section 3 - Relocation Expense			
Date	Item	Description of Expense	Amount
* Included as taxable income. The total amount will be forwarded to the Payroll Department for inclusion on the employee's W-2			Grand Total:

** [Business Use Mileage Rate](#)

Section 4 - Distance Test	
Old home to new job location _____ miles	Less: Old home to job location _____ miles Excess must be a least 50 miles _____ miles

Section 5 - Accounting Information				
Fund #	Organization #	Account #	Program #	Amount

Section 6 - Signature & Consent		
I certify that: All required documents have been attached to this completed form (New Hire offer letter & original itemized receipts). I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying Rowan University in full for those expenses		
Employee (Print Name)	Date	Employee (Signature)

Section 7 - Departmental Authorization		
Department Head (Signature & Date)	Provost (Signature & Date)	Payroll (Signature & Date)

Reimbursement Procedures

1. Employee responsibilities
 - a. Agrees to maintain accurate records of all expenses incurred in connection with such relocation.
 - b. Complete all sections of the Relocation Expense Form
 - c. Submit original itemized receipts with the request attached to a Relocation Expense Form. If original receipts are not received, the employee will not be reimbursed for those items.
 - d. Include a copy of the Appointment Letter
 - e. Make copies for your records (these records will be useful for purposes of filing individual tax returns)
 - f. Submitting individual expenses on multiple relocation forms will delay the reimbursement process.
2. Employing unit responsibilities
 - a. Review relocation documentation for appropriate signature and compliance with University policy and IRS Requirements.
 - b. If reimbursement of relocation expenses will be made using grant funding, the original documents, including the Letter of Appointment, should be forwarded to the Office of Sponsored Programs for processing.
 - c. Forward original documents for all other relocation expenses, including a copy of the Letter of Appointment, to the Payroll Office.
3. Office of the Senior Vice President for Finance and CFO responsibilities
 - a. Calculate tax-reporting requirements on the **Relocation Expense Form**.
 - b. Issue the reimbursement payment within ten business days.
 - c. **Report all relocation expenses on the annual W-2 Form.**
 - d. Retain documentation for audit purposes.

Rowan University Relocation Expense Checklist

Permissible/Non-permissible Expenses

Expenditure (page 1 of 2)	Eligibility for Reimbursement (Taxable)		
	Always Permissible	Permissible with Approval	Never Permissible
One Pre-move House hunting trip(s) (includes travel, lodging, meals, etc.) – house hunting trip not to exceed 5 days	X		
Airfare from former home to new home for the move trip for Employee and each Household Member	X		
Airfare, cost of travel via motor-vehicle (including tolls and parking), lodging and meals enroute from former home to new home for Non-household member for the move trip.			X
Cost of travel via motor vehicle from former home to new home at the standard mileage rate for moving expenses or rental car costs for Employee and each Household Member for the move trip.	X		
Tolls and Parking fees incurred enroute to new home	X		
Cost of lodging enroute to new home for the move trip including day of arrival for Employee and Household members	X		
Meals for Employee and Household members incurred enroute to new home for the move trip	X		
Cost of transportation of household goods and personal effects via Common Carrier (i.e., United Van Lines, etc.)	X		
Cost of transportation of household goods and personal effects via Non-common Carrier (i.e., truck rental such as U-Haul or Ryder)	X		
Moving Supplies (boxes, tape, etc.)	X		
Cost of packing, shipping household goods and personal effects	X		
Cost of shipping cars / pets to new home	X		
Temporary housing after day of arrival (Max: 14 nights)		X	
Rental car after the move for up to 7 consecutive days		X	

Expenditure (page 2 of 2)	Eligibility for Reimbursement (Taxable)		
	Always Permissible	Permissible with Approval	Never Permissible
Storage of household goods and personal effects for up to 30 consecutive days after the day your household goods are moved from former home and before they are delivered to new home		X	
Storage of household goods and personal effects after the 30 th consecutive day up to 60 days		X	
Any part of the purchase price of new home			X
Vehicle tags and Driver's License			X
Expenses of buying or selling a home			X
Expenses of contracting or breaking a lease			X
Home improvements to help sell your home			X
Loss on the sale of your home			X
Losses from disposing of memberships in clubs			X
Mortgage penalties			X
Real estate taxes			X
Refitting of carpets and draperies			X
Security deposits (including any given up due to the move)			X
Side trips outside the direct move from former to new home			X
Real Estate Agent commission, fees, etc.			X
Payments made with CashApp, Venmo, Zelle, ApplePay, etc.			X
Cash tips			X
State of NJ sales tax made on purchases including meals and lodging			X
Cash Payment for expenses with receipt from valid, verifiable vendor		X	