

**ANDERSON UNIVERSITY**  
**Moving Expense Reimbursement Worksheet**

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Date

Employee Name (please print)

Department

**Purpose of Worksheet:** The Employee Moving Expense Reimbursement Worksheet is used to document a request for reimbursement of qualified moving expenses. Anderson University will reimburse up to \$2,000 of qualified moving expenses. The reimbursement is paid through payroll as a taxable moving expense.

**Instructions:** Please complete, sign and return this worksheet along with your original receipts for moving expenses being claimed and other supporting documentation are to Human Resources. The original form and receipts will be returned to you after the human resources has verified the allowable expenses.

**Qualified Moving Expenses must meet the following criteria—**

- New workplace must be at least 50 miles farther from the employee’s former home than the old workplace **AND**
- Employee must work full-time in the area of the new workplace for at least 39 weeks during the 12 months immediately after the move

The IRS defines “home” as your main home or residence. It does not include other homes owned by you or members of your family. Your former home means the home you occupied prior to being hired by Anderson University.

**Moving expenses are not personal expenses incurred during a move such as—**

- Side trips for recreation/vacation while in route to new residence \$ \_\_\_\_\_
- Automobile repair costs while in route to new residence \$ \_\_\_\_\_
- Automobile registration costs \$ \_\_\_\_\_
- Clothing costs while in route to new residence \$ \_\_\_\_\_
- Home repairs or purchase of décor items for new residence \$ \_\_\_\_\_
- Expenses associated with buying/selling a home (or acquiring a lease) \$ \_\_\_\_\_

Non-Deductible Expenses (taxable) are those expenses the employee would not be allowed to deduct on their personal income tax return. Any reimbursement by Anderson University must be treated as a supplemental wage payment, subject to applicable withholding deductions (i.e. Federal and state tax, and FICA). Reimbursement of non-deductible moving expenses will be included in wages on the employee's W-2 Wage and Tax Statement in Box 1.

- 1. Pre-move house/apartment hunting trips. \$ \_\_\_\_\_
  - 2. Expense for all meals related to the move from the old residence to the new residence. \$ \_\_\_\_\_
  - 3. Travel for members of family and friends, assisting with the move, but not relocating to the new residence. \$ \_\_\_\_\_
  - 4. Mileage reimbursed at the difference between IRS allowable rate (\$0.54) and AU's Travel Policy rate (\$0.44) (Miles \_\_\_\_\_ @ \$0.10) \$ \_\_\_\_\_
  - 5. Cost of temporary housing. \$ \_\_\_\_\_
- Total Non-Deductible Expenses Reimbursement Due** \$ \_\_\_\_\_

<b>Departmental Approval Signature</b>	<b>Budget Account Number</b>

**Completed by the Business Office**

Account No.	Debit	Credit	Approval