

Staple Here

# UNIVERSITY of ROCHESTER

Form F-7  
Rev. 5/2014

## - Moving Expense Report -

This form is to be used for Post-Hire expenses only.  
 To facilitate processing, please include:  
 \* All pertinent information and countersignatures as described below  
 \* Original supporting documentation, such as invoices, receipts, or other evidence of charge  
 \* Copy of Offer of Employment Letter

Payee: \_\_\_\_\_

EMPLID: \_\_\_\_\_

Payee Address: \_\_\_\_\_  
\_\_\_\_\_

Date Submitted: \_\_\_\_\_

Employment Start Date: \_\_\_\_\_

Date Due: \_\_\_\_\_

Moving From (City, State, Country): \_\_\_\_\_

Department: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Children:	Name	Age
	_____	_____
	_____	_____
	_____	_____

UR Contact: \_\_\_\_\_

Phone #: \_\_\_\_\_

Itemized Moving Expenses:	Qualified	Non-Qualified	Total
Goods & Personal Effects	_____		\$ -
Travel: <input type="checkbox"/> Airline	_____		\$ -
<input type="checkbox"/> Car (# of Miles) _____	_____		\$ -
Lodging	_____		\$ -
Meals	xxxxxxxxxxxxxx	_____	\$ -
Other Expenses (Identify Types) _____	_____	_____	\$ -
	_____	_____	\$ -
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

**SC62040 OP01014**; Less Advance

<b>Net Amount</b>	<b>\$ -</b>	<b>* \$ -</b>	<i>* Attach Form 211</i>
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FAO to be Charged:

<b>Company</b>	<b>Spend Category</b>	<b>FAO</b>
CM <input type="text"/>	SC <input type="text"/>	<input type="text"/>

Send check to (if different from above): NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

**3 Signatures Required**

Requestor (print)	Requestor Title	Phone	Requestor Signature	Date
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Approver (print)	Approver Title	Phone	Approver Signature	Date
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Reviewed By (Finance Office): \_\_\_\_\_  
**UNIVERSITY OF ROCHESTER**  
**- Moving Expense Report -**  
**Instructions**

- \* Complete all information on the F-7 as indicated.
- \* Qualified expenses are defined by the IRS as:
  - (1) Reasonable costs of moving household goods and personal effects from the former residence to the new residence.
  - (2) Traveling from the former residence to the new residence. Traveling includes transportation costs (coach airfare or automobile) and lodging (no meals) during the move only.
- \* Non-Qualified expenses are expenses other than those defined above which have departmental approval and should be submitted for reimbursement as extra compensation (for example house hunting expenses). These expenses are considered taxable by the IRS and are reported on the employee's form W2.
- \* Original supporting documentation for all expenses must be included with the F-7. This may include:
  - The detailed bill from the moving company for goods & personal effects.
  - The original passenger receipt from the airline ticket.
  - The itemized hotel bill.
- \* Travel is authorized by air or car. Check the item that applies.  
The University will reimburse actual cost of coach airfare, or personal automobile at the rate indicated in the Mileage Reimbursement Policy.
- \* Lodging during travel should include the actual cost of the room only. Lodging in the Rochester area is not a qualified moving expense and should not be included in your estimate.
- \* Any advances previously received should be subtracted from the total expenses to arrive at the net amount due to the employee.
- \* Form 211 (Request for Extra Compensation) is required for reimbursement of non-qualified expenses, per IRS regulations. Form 211 will be processed by Payroll.
- \* Complete the "Send Check To:" section if the check is not to be delivered to the address shown at the top of the form.
- \* 3 Signatures (of employees, department head, and appropriate VP/Dean) are required.
- \* The F-7 form (Moving Expense Report) must be submitted within 60 days of completion of the move. Failure to do so will require the University to include the advance amount in the employee's W-2, subject to tax withholding.
- \* The IRS permits one qualified mover per job. If you do two or more partial moves you can pick whichever move you'd like to include as qualified (not taxed) as long as it occurred within one year of your start date.