

INSTRUCTIONS FOR RELOCATION EXPENSE FORMS

House Hunting Expenses Only

General Instructions

- All house hunting expenses, whether reimbursed to the individual or paid directly to a vendor on behalf of the individual, are taxable income to the individual, and must be reported to the Tax Department on a **House Hunting Expenses Only Form**.
- Complete a separate house hunting form for each visit.
- Only copies of receipts must be submitted with the relocation form for taxable expenses. Original receipts for taxable items should be retained by the individual that incurred the expense. Any original receipts sent to the Tax Department for taxable payments will be returned to the department.
- Forms must be submitted to the Tax Department within 60 days of individual's start date.

Specific Instructions

- (1) Provide EMPLID. If EMPLID is not available, use Student ID or SSN and expected start date.
- (2) Name of employee, stipend recipient, fellow, or student for whom the expenses were incurred.
- (3) Enter the start and end dates of the house hunting visit for which the expenses were incurred.
- (4) Include a detailed description of the activities
- (5) Enter the names of all travelers for whom expenses are being reimbursed as well as their relationship to the employee, stipend recipient, fellow, or student.
- (6) If expenses were incurred using foreign currency, enter the exchange rate for the date on which the expense were incurred.
- (7) EXPENSE INFORMATION
 - Provide a breakdown of expenses incurred by category.
 - Add additional types of expenses as needed.
 - Note that all house hunting expenses are coded to BUOB 3676.
 - Include all direct payments made to vendors on the individual's behalf as well as any prepayments.
 - Calculate any amounts overpaid or still owed to the individual.
 - In the event of an overpayment, the employee will need to remit the amount overpaid to the department.
 - In the event that WU owes the individual, payments to employees will be made via Payroll after the individual's appointment has begun.
 - ◆ For reimbursements prior to commencement of employment, the Relocation **Waiver for Payment Form** must be completed and submitted to the Tax Department with the **House Hunting Expenses Only Form**.
- (8) PAYROLL INFORMATION
Enter the account numbers to which the expenses incurred will be charged.
- (9) Traveler and approver must sign the Relocation form.
Include the preparer's contact information in the event that the Tax Department has questions or needs additional information.
Print approver name.