

Moving Expense Allowability at Iowa State University

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Welcome to Iowa State University!

As you prepare for your move to campus, we want to ensure you have a clear understanding of how to submit your moving expenses. Please follow the detailed instructions below to ensure a smooth reimbursement process.

Eligibility for Reimbursement

Full-time employees are conditionally eligible for moving expense reimbursement. Moving expenses may also be authorized for part-time faculty and P&S employees with specific approval from authorized individuals (such as the president, provost, respective senior vice president, dean, director, department chair, or designee). Specific approval must be documented with authorizing signatures on the appropriate document (e.g., purchase requisition, disbursement voucher).

All employees claiming reimbursement for moving expenses or travel related to moving expenses must have an offer letter from the department stating the maximum amount the department is willing to pay.

Preferred Moving Vendor

Iowa State University (ISU) has a contract with Beltmann Group, an approved vendor for moving services. Priority consideration should be given to Beltmann Group when arranging your move.

- **Contact Information:** For more details about the contract, please contact Tisha Campbell in Procurement Services.
- **Payment Process:** Beltmann Group is paid directly by ISU through a Supplier Invoice, eliminating any out-of-pocket costs for you.
- **Information Packet:** Procurement Services provides a packet of moving information to new employees.
- **Estimate Process:** When a moving estimate is received from Beltmann Moving for a new employee, Procurement Services will send the estimate and an email to the department contact, asking them to submit a request for a non-catalog requisition. The department should forward the estimate, worktag, and business purpose to Finance Delivery at finance_delivery@iastate.edu or submit a request through ServiceNow [here](#).

Using Other Moving Companies

While it's recommended to use Beltmann Group, you may hire your own moving company and pay out of pocket, though this is discouraged for the following reasons:

- **Taxable Income:** Employee moving expense reimbursements are considered taxable income.
- **Payment Restrictions:** ISU will not pay for friends or family to assist in the move.
- **Documentation Requirements:** Any third-party moving company must provide an itemized invoice, and you must submit proof of payment for reimbursement.

Reimbursable Expenses

You can be reimbursed for the following moving-related expenses:

- **Moving Trucks/Vans and Supplies:** Includes rental costs and moving supplies.
- **Insurance Costs:** For moving-related insurance.
- **Travel Expenses:** For you and your spouse (note: ISU does not cover expenses specifically for children or other family members unless otherwise specified and approved in advance by a senior vice president).
- **Travel Policy Compliance:** All travel expenses must comply with ISU's travel policy, including receipt requirements. Unallowable expenses in travel situations are also unallowable for moving expenses.

Relocating Employee Assistance

When the decision is made to assist with relocating an employee by paying household moving expenses, the department should request a new employee household moving packet from Procurement Services. This packet includes information to assist in the expedient processing of household moving payments. Eligibility, limitations, and procedural requirements are as follows:

- Centrally budgeted university funds and sponsored program funds cannot be used for this purpose.
- Based on the university's established travel policies, interview trips for prospective faculty and staff may be reimbursed at the business unit manager's discretion.
- After the new employee has accepted employment, travel expenses may be reimbursed for one trip for the employee and spouse/partner to arrange housing. At the discretion of the respective senior vice president or the president (or their designee), travel expenses for house hunting trips prior to accepting employment, subsequent house hunting trips, and reimbursement for additional family members may be authorized. Reimbursement of these items constitutes taxable income to the employee.
- Additional costs associated with moves from two households require specific approval from an authorized senior vice president. Expenses associated with home sale or lease breakage will not be reimbursed.
- ISU may reimburse the cost to store household items up to 30 days. Storage fees beyond 30 days may be authorized with specific approval from appropriate authorized individuals.

- Personal travel or temporary living expenses for the individual and immediate family associated with accepting new employment may be reimbursed. Such reimbursement is limited to mileage for two vehicles and for travel using the most direct route.
- Reimbursement of temporary housing expenses, meals, and mileage (in excess of IRS limits) constitutes taxable income to the employee.

Offer Letter and Maximum Allowance

Your offer letter should specify the moving allowance and is issued by a dean, department chair, business unit manager, or senior vice president. Important points to note:

- **Maximum Allowance:** Only actual expenses can be claimed. If your expenses are less than the maximum allowance, you can only claim the amount actually spent.
- **Direct Payments:** If Beltmann Group is used and paid directly by Procurement Services, this amount must be subtracted from your maximum allowance.

Submission Process

Reimbursements for moving expenses are considered taxable income and should not be submitted through the expense report portal in Workday. Instead, follow these steps:

1. **Gather Documentation:**
 - Itemized receipts for all moving services, including hired services, moving trucks/vans, and supplies (including Beltmann invoices).
 - Receipts for lodging, gas (for rented vehicle/moving truck), insurance costs, and airfare.
 - Documentation for meals and mileage eligible for claiming.
 - A summary (typically an Excel sheet) showing all expenses and the total amount.
2. **Submit Information:**
 - Email all documentation to the Manager of Financial and Accounting Compliance at fact@iastate.edu.
3. **Review and Approval:**
 - The Manager of Financial and Accounting Compliance will review the charges and receipts. If approved, the reimbursement will be processed and paid out via Payroll.

If you have any questions or concerns about the moving expense submission process, please contact Financial and Accounting Compliance at fact@iastate.edu. We are here to assist you and ensure a smooth transition to your new role at Iowa State University.

We look forward to welcoming you to our community and wish you a smooth and successful move!