Travel Expense Voucher (TEV) Tips

- See attached for allowable moving expenses
- Submit the largest non-taxable expense first (ie: mover's invoice), no need to include other expenses if this exceeds $1,800
- If trainee has both non-taxable and taxable expenses, prepare separate TEVs, with the non-taxable TEV first to maximize the $1,800 reimbursement

<table>
<thead>
<tr>
<th>Non-Taxable: (paid directly to trainee)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Moving household goods from old residence to SF 50 miles or more</td>
</tr>
<tr>
<td>• Final trip expenses, including transportation and lodging, excluding meals</td>
</tr>
<tr>
<td>• Storage 30 days or less</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Taxable: (paid to trainee via payroll)</th>
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</thead>
<tbody>
<tr>
<td>• Moving household goods from old residence to SF less than 50 miles</td>
</tr>
<tr>
<td>• House hunting expenses, including transportation lodging and meals</td>
</tr>
<tr>
<td>• Final trip meals</td>
</tr>
<tr>
<td>• Storage more than 30 days</td>
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<tr>
<td>• Temporary housing</td>
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</tbody>
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Most Common Mistakes

- Documentation Requirements:
  ◦ Receipts are required for ALL airline, lodging, car rental, and mover's invoice, and other expenses greater than $75
  ◦ Receipts must show last four digits of credit/debit card number (redact other confidential account numbers)
  ◦ If all means to locate the above receipts have been exhausted, complete and have trainee sign Declaration of Missing Receipt form
  ◦ For expenses less than $75, receipts are not required, but if available, include along with the TEV

- Moving of household goods (input on TEV line 22):
  ◦ If cash is paid to movers, include copies of cashier's check, bank statement, or moving invoice with $0 balance due
  ◦ Reasonable tips are allowed
  ◦ For shared moving expenses, provide timeline of travel with participant names, dates, location and calculation of cost breakdown
  ◦ Not allowed: Purchase of personal goods (mattress, bedding, furniture)

- Driving: Claim $.19/mile rate or actual gas receipts?
  ◦ If driving personal car, calculate $.19 x total miles driven from old residence directly to SF (include on TEV Line 22)
  ◦ If driving rental (car or U-Haul), include $ amount spent on rental and gas (include on TEV line 6–rental, line 5–gas)
  ◦ Not allowed: rental car insurance if the rental company is covered by UC travel policy

- Air travel to SF will be reimbursed for the most direct route:
  ◦ Airfare will be reimbursed at the lower of actual expense or comparable, include itinerary. (if name differs from trainee's name, include explanation and relationship to trainee)
  ◦ Reasonable one to two hour layover is allowed
  ◦ Not allowed: Upgrades, frequent flyer miles purchased, and air internet packages

- Lodging:
  ◦ List room charge and room tax by date (if name on hotel invoice differs from trainee's name, include explanation of relationship to trainee)
  ◦ List hotel meals separate on taxable TEV
  ◦ Not allowed: Lodging in excess of reasonable rates

- Meals:
  ◦ Meals are allowed for trainee and his/her immediate family, while travelling together, input date on TEV in order to calculate the maximum $74 per family per day (no alcohol)
  ◦ Final trip ends when arriving in San Francisco. There should be no further meal or lodging expenses in San Francisco unless staying in temporary quarters

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