

HOW TO SUBMIT MOVING EXPENSE REIMBURSEMENT

The purpose of this document is to guide full time UTRGV faculty or employees on how to request a moving expense reimbursement. It is recommended that employees submit reimbursement requests as soon as possible, as reimbursements are allowed for submission for up to one year from the date of hire. Accounts Payable will obtain a copy of the offer letter from Human Resources detailing the maximum expense limit awarded to the Employee.

Faculty/staff can initiate reimbursements after the official employee start date. Beginning September 2024, UTRGV employees are eligible for reimbursement of relocation expenses for immediate family members as part of the final trip. Examples include airfare, lodging and other costs associated with moving personal effects. Immediate family includes spouse or domestic partners, dependent children, or other dependents residing in the employee's household.

All allowable moving expenses are in the UTRGV Handbook of Operating Procedures, section [Moving Expense Policy-ADM 10-601](#).

1. Log into **my.utrgv.edu** using your UTRGV credentials.
2. Select the iTravel+ application icon.
If submitting for a UTRGV **EMPLOYEE who is receiving a reimbursement**, Search for the name to start the session.
3. From the **Home** tab, select **Expense**.
4. Select **Create New Report**.
5. Select the **Business Expense Reimbursement** policy and complete the required fields.

Create Report.

Create New Report

Create From an Approved Request

* Required field

Policy *
-Business Expense Reimbursen...

Report Total

Report Name *
Juan Smith relocation expenses

Business Purpose *
Relocation Expenses

Benefit to University *
1-Related to Employee and Student ...

Speedtype *
(31050059) DES-Procurement

Alcohol Beverage purchases (as part of the business expense meal) *
No

Justification
Relocation reimbursement for new faculty hire

Comment
Approved relocation expense amount is \$3,000.
Please see offer letter attached.

Cancel Create Report

Report Name – Use the employees name in order to identify easily.

Business Purpose – select the most appropriate response.

Benefit to University – select the most appropriate.

Speedtype – enter the approved cost center responsible for reimbursement fees.

Alcohol Beverage purchases – select Yes if reimbursement includes alcohol purchases or No if does not apply.

Justification and Comment – include information useful to cost center manager approvers or Accounts Payable. Offer letter should not be attached.

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6. Click **Add Expense**.
7. From the **Create New Expense** tab, select **Empl Moving Exp Nontax**.
Use Empl Moving Exp Nontax expense option for transactions.

8. Complete the required fields of the expense form and **Save Expense**.

Expense type – use *Empl Moving Exp Nontax* for all expenses.

Transaction Date – enter the date on the receipt for the expense.

Business Purpose and Benefit to University – this is auto populated from the request form.

Vendor Name – recommended to list the business name.

City of Purchase – the location of where the expense was charged.

Payment Type – select *Out of Pocket*.

Amount – enter the amount of reimbursement according to the receipt or edit if charge includes an unallowable expense.

Currency – select *US, Dollar (USD)*.

Justification – enter a validation for this expense.

Comment – enter other details if necessary.

Add Receipt – upload or drag and drop copy of receipt.

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9. Click **Add Expense** to continue to include other applicable moving expenses. *Repeat steps 7-8.*
If no other expenses are required, continue to Step 10.
10. Include required documentation under Manage Receipts before submission. Omitting these documents may result in a returned/delayed expense report. Valid receipts must show the method of payment. (Ex. Visa x1234)

Juan Smith relocation expenses \$807.47

Report Details ▾ Print/Share ▾ Manage Receipts ▾

Add Expense Edit Delete Manage Attachments View Receipts in New Window Missing Receipt Declaration

Comment ↑↓ Receipt ↑↓ Expense Type ↑↓

11. Once all allowable expenses are created, click on **Submit Report**.
Reminder, all expense types are listed as (Empl Moving Exp Nontax).

Juan Smith relocation expenses \$807.47 Delete Report Copy Report Submit Report

Not Submitted | Report Number: GTCFWP

Report Details ▾ Print/Share ▾ Manage Receipts ▾ View Available Receipts ⓘ

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

<input type="checkbox"/>	Comment ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ↑↓	Requested ↑↓
<input type="checkbox"/>			Out of Pocket	Empl Moving Exp Nontax	Vaquero Hotel Edinburg, Texas	10/05/2023	\$230.00
<input type="checkbox"/>			Out of Pocket	Empl Moving Exp Nontax	Stripes Houston, Texas	10/03/2023	\$377.47
<input type="checkbox"/>			Out of Pocket	Empl Moving Exp Nontax	Uhaul Houston, Texas	10/02/2023	\$200.00
							\$807.47

12. Click **Accept & Continue** on the Electronic Agreement pop up.
13. Review Report Totals and Click **Submit Report**.

Report Totals X

Company Payments
\$807.47
Employee

Employee Payments
\$0.00
Company

Amount Total: \$807.47	Due Employee: \$807.47	Owed Company: \$0.00
Requested Amount: \$807.47	Total Paid By Company: \$807.47	Total Owed By Employee: \$0.00

Cancel Submit Report

14. Close the **Report Status** pop up.

Report Status X

✓ **Report Submitted**

Juan Smith relocation expenses | \$807.47

Close