

OFFICE OF THE CONTROLLER

General Accounting Moving/Relocation Training

February 2024





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Moving & Relocation Overview



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Moving and Relocation Process

- **Step 1:** ****During onboarding process**** Moving agreement and offer letter should be sent to moving@mailbox.sc.edu. These documents will be forwarded the University Controller, for approval & signature.
- **Step 2:** Submit Employee Relocation & Moving Request Form and all required documentation (preferably as one document) to moving@mailbox.sc.edu.



Moving & Relocation Request Form



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Moving and Relocation Form



Employee Relocation and Moving Request Form

Under the Tax Cuts and Jobs Act of 2017 (Public Law No. 115-97), employer paid moving and relocation expenses are taxable to the employee regardless of the form or manner of payment, e.g., reimbursement, or direct payment to third parties. Any such payments made to or on behalf of a relocating employee on or after January 1, 2018 will be reported as taxable income to the employee.

Employee Information

Employee Name:		Date Moving Agreement Signed:	
Department Name:		USC ID (<i>Needed for payroll purposes</i>):	

Relocation Information

Former Primary Residence:		New Primary Residence:	
Street:		Street:	
City/Town:		City/Town:	

Maximum Reimbursement Allowed (per Relocation and Moving Agreement)		\$	-
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Chartfields

Operating Unit	Department	Fund	Account	Class	PC Business Unit	Project	Activity	Cost Share



Moving and Relocation Form (con't)

Expenditures			
Household Goods and Personal Effects:			
Common Carrier:			\$ -
Self Move:	Vehicle Rental and Accessories		\$ -
	Moving/Packing Supplies		\$ -
	Fuel and Oil		
	Labor		\$ -
Total Household Good and Personal Effects			\$ -
Travel and Lodging:			
Travel Expenses	Airfare (Coach Only)		\$ -
	Lodging		\$ -
	Mileage (Moving Standard Rate - 21 cents per mile)		\$ -
	Total Travel and Lodging		
Other Expenses:			
Temporary Storage of Household Goods			\$ -
Temporary Housing			\$ -
Miscellaneous			\$ -
Total Other Miscellaneous			\$ -
Total Expenditures			\$ -

****All receipts are required and must be attached to this request.**



Moving and Relocation Form (con't)

Employee Certification and Agreement

I certify the expenses listed below were incurred by me or on my behalf for the purpose of personal relocation and moving at the request of the University of South Carolina and in accordance with the terms agreed upon in the Relocation and Moving Expense Agreement.

Employee Signature

Date:

The expenses shown on this request have been reviewed for accuracy and conformity with University of South Carolina relocation reimbursement regulations and are considered to be reasonable and proper.

Departmental Approval:

Date:



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Moving & Relocation Required Documentation



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Required documentation for reimbursement

- Employee Relocation and Moving Request Form – fully signed and completed to include the employee’s payroll account code (51200, 51300, etc.)
- Fully signed moving agreement (to include University Controller’s signature)
- Fully signed offer letter
- Backup for items listed on the form in the same order – invoices, bill of lading, payment verification, mileage map and/or **itemized** gas receipts, etc.



Notes, Restrictions & Required Documents

Cost Category	Notes and Restrictions	Required Documentation
Transporation of Household Goods:		
Commercial Carrier		*Bill of Lading *Original itemized receipts required and clearly showing amount paid
Self Move - Vehicle Rental		*Rental Agreement *Original paid itemized receipts
Self Move - Fuel and Oil		*Original paid itemized receipts
Self Move - Personal Vehical Mileage	*No side trips, must be most direct route *IRS Moving Rate to be used	*Document miles from former residence to new residence
Self Move - Labor	*Labor provided for employee or employee's immediate family is not reimbursable	*Receipt from labor used to include signature and amount paid



Notes, Restrictions & Required Documents

Cost Category	Notes and Restrictions	Required Documentation
Travel and Lodging: (from former primary residence to new primary residence)		
Airfare	*Coach only *Immediate family members living in residence only	*Original passenger coupon or detailed paid invoice
Lodging	*One night at departure location and one night at arrival location	Original itemized paid lodging receipt
Personal Vehicle Mileage	*No side trips, must be most direct route *IRS Moving Rate to be used	*Document miles from former residence to new residence
Rental Car		*Rental Agreement *Original paid itemized receipts
Fuel	*Not allowed if claiming mileage at IRS rate	*Original paid itemized receipts
Tolls, Taxis, Shuttle and Parking		*Original paid itemized receipts



Notes, Restrictions & Required Documents

Cost Category	Notes and Restrictions	Required Documentation
Other Expenses:		
Temporary Storage	*No storage in excess of 30 days allowed	*Original paid itemized receipts

Upcoming Training



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Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

➤ PeopleSoft Finance Training Schedule

Listservs

Social Media

Contact Us

PeopleSoft Finance Training Schedule

2024 Session Dates and Times

For information about a class you're interested in attending, please email the PeopleSoft Training Team at pstrain@mailbox.sc.edu.

What	When	How Long	Where
Program Expense Card Training	Monday, January 8 9 a.m. - 10 a.m.	1 hour	Online (Teams Meeting)
Program Expense Card Training	Tuesday, January 9 9 a.m. - 10 a.m.	1 hour	Online (Teams Meeting)
Travel and Expense Proxy Training	Wednesday, January 17 9 a.m. - 12 p.m.	3 hour	Online (Teams Meeting)
Program Expense Card Training	Monday, February 5 3 p.m. - 4 p.m.	1 hour	Online (Teams Meeting)
Program Expense Card Training	Tuesday, February 6 9 a.m. - 10 a.m.	1 hour	Online (Teams Meeting)
Travel and Expense Proxy Training	Wednesday, February 14 9 a.m. - 12 p.m.	3 hour	Online (Teams Meeting)
Program Expense Card Training	Monday, March 4 9 a.m. - 10 a.m.	1 hour	Online (Teams Meeting)
Program Expense Card Training	Tuesday, March 5 9 a.m. - 10 a.m.	1 hour	Online (Teams Meeting)
Travel and Expense Proxy Training	Wednesday, March 13 9 a.m. - 12 p.m.	3 hour	Online (Teams Meeting)
Program Expense Card Training	Monday, April 8 3 p.m. - 4 p.m.	1 hour	Online (Teams Meeting)
Program Expense Card Training	Tuesday, April 9 9 a.m. - 10 a.m.	1 hour	Online (Teams Meeting)

Upcoming Training Dates

To [register](#), click the link for the date/time that works best for you. On the registration page, provide your first/last name and email. Once registration is complete you will receive a confirmation email and the session will be added to your calendar.

Registration Tip: If you have trouble registering, you may need to clear cache or use a different browser.



Resources & Contacts



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Office of the Controller

Office of the Controller

General Accounting

[Accounts Payable](#)[Capital Assets](#)[Chart of Accounts](#)[General Ledger](#)➤ [Moving and Relocation](#)[Travel](#)[Treasury Management](#)[General Accounting Staff Directory](#)Grants and Funds
ManagementCompliance and Tax
Management

Payroll Department

Operational Management
and ReportingExternal Financial Reporting
and TransparencyResource and Training
Toolbox

Contact Us

Moving and Relocation

Due to the changes in the law with the passage of the Tax Cuts and Jobs Act of 2017 (Public Law No. 115-97), it was necessary for the university to completely rework the Relocation and Moving Allowance policy. This is complete and went into effect August 14, 2018.

The University Administration and Finance Division, Controller's Office, will ensure compliance with University Policy FINA 1.08 in the guidelines and procedures outlined below. This procedure is applicable to all moving and relocation, regardless of the source of funds used for reimbursement.

Under the Tax Cuts and Jobs Act of 2017 (Public Law No. 115-97), employer paid moving and relocation expenses are taxable to the employee regardless of the form or manner of payment, e.g., reimbursement, or direct payment to third parties. Any such payments made to or on behalf of a relocating employee on or after January 1, 2018 will be reported as taxable income to the employee.

Email all forms and any questions to moving@mailbox.sc.edu.

[Policy FINA 1.08 \[pdf\]](#)

[Procedure FINA 1.08 \[pdf\]](#)

Forms:

[Moving Agreement \[pdf\]](#)

[Relocation and Moving Request Form \(July 1 2022 to December 31 2023\)](#)
[xlsx]

[Relocation and Moving Request Form \(January 1 2024 and Forward\)](#) [xlsx]

Contact Moving and
Relocation

For questions about any Moving and Relocation services, please contact us directly:

1600 Hampton Street, 6th floor
Columbia, SC 29208

Email: moving@mailbox.sc.edu

Where to Find the Resources

For Moving & Relocation resources, visit the Moving and Relocation section on our [General Accounting](#) page.



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Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

Account Funding Change

Expand all



AP Uploads



Business Expense Prepaid Cards



Cash Advances



Cost Transfer



Departmental Deposits



Employee Reimbursement (Non-travel)



Endowments



Finance Intranet



Where to Find the Resources

For general training resources, visit our [Business Manager](#) page.



Controller's Office Contact List

General Accounting (JEs, JVs, Apex, GL issues/Questions)	Email Address
General Email Address	genacctg@mailbox.sc.edu
Cash Advance Settlement	cashadvc@mailbox.sc.edu
Payroll Retro Journal Entries	retroje@mailbox.sc.edu
Chartfield Maintenance	cfmaint@mailbox.sc.edu
Moving & Relocation Mailbox	moving@mailbox.sc.edu
PeopleSoft Finance Security Requests	pssecure@mailbox.sc.edu
Accounts Payable	Email Address
General Email Address	ap@mailbox.sc.edu
AP Uploads	apupload@mailbox.sc.edu
Supplier Maintenance	apsupplr@mailbox.sc.edu
Travel Office	Email Address
General Email Address	teoffice@mailbox.sc.edu
Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers	tesubmit@mailbox.sc.edu

Controller's Office Contact List

Capital Assets	Email Address
Physical Inventory	physinv@mailbox.sc.edu
Cash Management and Treasury	Email Address
General Treasury Email Address	treasury@mailbox.sc.edu
Business Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	trvcard@mailbox.sc.edu
Compliance and Tax	Email Address
General Compliance Email Address	concp1@mailbox.sc.edu
General Tax Email Address	tax@mailbox.sc.edu
Research/Development Sales/Use Tax Exemptions	rdequip@mailbox.sc.edu
Payroll	Email Address
General Email Address	payroll@mailbox.sc.edu

Questions



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THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



Address:

1600 Hampton Street
Columbia, SC 29208



Contact Number:

Phone: 803-777-2602
Fax: 803-777-9586



Email Address:

controller@sc.edu



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