

RELOCATION at JLab

Process, Policy, and Procedures

Questions & Answers

JLab Process for selected candidates

- Interviewee accepts offer of employment from JLab
- HR sends letter of acceptance with relocation terms & conditions (copies TS and TC named in paperwork)
- TS send welcome email + Relocation Questionnaire
- TC sends welcome email and offer to assist w/travel arrangements.
- TS forwards completed questionnaire to TC
- TS notifies moving subcontractor and authorizes shipment
- TC completes TA's for relocation services offered to them
- TC arranges transportation and temporary lodging (if needed)
- TC submits ERs for allowable expenses

POLICY

Reference Documents

- **Letter of Acceptance of Offer from JLab**
 - Sent to TC by Human Resources
- **JLab Administrative Manual – Section 402.05**
 - Link provided from Travel – Home web page
- **Federal Travel Regulation – Chapter 302**
 - Link provided from Travel – Home web page
- **Relocation Q & A Briefing presentation**
 - Travel – Training web page

REGULAR EMPLOYEE

Full Time or Term

House Search

- Terms -
 - Employee and/or spouse (only)
 - 3 full days and 4 nights
 - Must live over 75 miles from Lab.
 - Employee must complete before start date
 - Spouse can come after employee starts
- Covered Expenses -
 - Transportation (POV or air)
 - Lodging (4 nights @ NN rate)
 - Per diem(4.5 days @ NN rate)
 - Rental Car (up to 4 days)

EN ROUTE TRAVEL

- Air for employee and qualified family members.
- Private Owned Vehicle (POV).
- Covered expenses –
 - Air - One way air tickets in coach
 - Prefer JLab to arrange
 - POV mileage and tolls
 - Lodging – more than 300 miles between start/end
 - Meals per diem

Household Goods Movement

- Terms —
 - Regular or Term employee
 - Must complete 1 full year or reimburse Lab
 - At least 50 miles between former residence and NN
- Covered Expenses —
 - Pack and Ship up to 15,000 lbs.
 - One car
 - Large or bulky items
 - Contract moving agent, or
 - Self move (3 quotes)
 - Storage up to 45 day

Temporary Lodging and Meals Per Diem

- Lodging

- Up to 45 nights at local per diem rate.
 - Employee & family together
 - New location, and/or
 - Old location
 - Employee & family separate
 - New location, and/or
 - Old location
- Direct bill encouraged
- Long-term stay property preferred.

- Meals Per diem

- Up to 45 days at local rate
- Employee –
 - First 30 days/ full PD
 - After 30 days/ 75%
- Spouse –
 - First 30 days/ 75%
 - After 30 days/ 50%
- Children 12 and over –
 - First 30 days/ 75%
 - After 30 days/ 50%
- Children under 12 –
 - First 30 days/ 50%
 - After 30 days/ 40%

Miscellaneous Expense Allowance

- Terms -
 - Old residence must be at least 50 miles from
 - The MEA can not be given in advance of reporting to work.
 - Supportive documentation is not required
- Covered Expense -
 - \$500 - if no immediate family is being relocated.
 - \$1000 - when immediate family is relocating.
 - Deductions may apply (i.e., temp storage of private vehicle paid by JLab).

SALE and/or PURCHASE OF HOME

- Terms —
 - Included in relocation offer pkg
 - primary residence
 - Sale — more than 50 miles from JLab
 - Property deeded to employee and/or spouse
 - Submittal of fully executed copy of HUD Statement signed by buyer, seller, and settlement agent.
 - HUD statement must be executed within 2 years of start date
- Covered Expenses * —
 - Sale —
 - Commission to broker
 - Document Prep & Transmittal
 - Attorney fees
 - Other accepted expenses
 - Purchase —
 - Lender's Title Insurance
 - Appraisal
 - Title Search & Survey
 - Loan Origination Fee
 - Transfer taxes
 - Other accepted expenses

* For full list - see Attachment A to the Offer Letter.

POST DOC'S

Are entitled to:

1. Up to \$7,500 to relocate,
 - Household furniture, books, and publications
 - Car
 - Storage (up to 30 days)
2. Temporary lodging and meals per diem – up to 30 days
3. Miscellaneous expense allowance – same as regular

PROCEDURES

Travel Authorization examples & instructions

Expense Report examples & instructions

TRAVEL AUTHORIZATION

EMPLOYEE & SPOUSE – HOUSE HUNTING

Purpose: House hunting trip		Training: No	
Begin Date: 10-Aug-2010	End Date: 14-Aug-2010	Personal days: 0	
Destination Country: United States of America	State: VA	City / Region: NEWPORT NEWS	
Distance: > 125 Miles	Duration: Multi-Day.	Conference: NO	
Travel Requirements		JLAB	Traveler
VEHICLE:	Personal Vehicle	0	miles @ \$0.500 per mile \$0.00
GSA Vehicle NO	Rental Car	\$ 180.15	\$ 0
AIR:		\$ 690.00	\$ 0
RAIL:		\$ 0	\$ 0
TAXI / LIMO / SUBWAY / BUS:		\$ 0	\$ 0
LODGING: 4 day(s) @ \$80.00 = \$320.00		\$ 320.00	\$ 0
LODGING TAXES, FEES, ETC:		\$ 40.00	\$ 0
PER DIEM:		4.5 day(s) @ \$56.00 per day	\$252.00
REGISTRATION FEE:		\$ 0	\$ 0
MEALS PROVIDED:	Breakfast: 0 (0)	Lunch: 0 (0)	Dinner: 0 (0) \$0.00
BANQUET FEE:		\$ 0	\$ 0
EXCESS BAGGAGE:		\$ 0	\$ 0
MEETING ROOM:		\$ 0	\$ 0
CLERICAL SERVICES:		\$ 0	\$ 0
STIPEND:		\$ 0	
MISCELLANEOUS / OTHER:		\$ 0	\$ 252.00
SubTotals		\$1,230.15	\$504.00
		Recalc	Total estimated Cost = \$1,734.15

Up to 4 days car rental

R/T air for employee and spouse

Misc: Spouse per diem for 4.5 days

All house hunting is taxable (55-013)

Employee & Spouse Travel to JLab + Temporary Subsistence

Begin Date: 29-Aug-2010		End Date: 10/14/10		Personal days: 0	
Destination Country: United States of America		State: VA		City / Region: NEWPORT NEWS	
Distance: > 125 Miles		Duration: Multi-Day.		Conference: NO	
Travel Requirements		JLAB		Traveler	
VEHICLE:		Personal Vehicle		590	miles @ \$0.500 per mile \$295.00
GSA Vehicle NO		Rental Car		\$0	\$0
AIR:				\$0	\$0
RAIL:				\$0	\$0
TAXI / LIMO / SUBWAY / BUS:				\$0	\$0
LODGING: 47 day(s) @ \$80.00 = \$3,760.00				\$3600	\$150.
LODGING TAXES, FEES, ETC:				\$450	\$0
PER DIEM:				47.5 day(s) @ \$56.00 per day	\$2,660.00
REGISTRATION FEE:				\$0	\$0
STIPEND:				\$0	
MISCELLANEOUS / OTHER:				\$0	** \$2251.85
SubTotals				\$4,050.00	\$3,207.00
		Recalc		Total estimated Cost = \$7,257.00	

- *** Misc: Mileage rate for relocation is .165 - deduct difference of \$197.65
 Employee & Spouse per diem, en-route = \$46/day (2.75 @ 46=126.50 * 2=\$253
 Spouse per diem (30 @ 42=\$1260 + 15 @ 28= \$420 = total \$1680.
 Employee - deduct travel days \$126.50) + 25% after 30 days = (630) = \$(483.50)
 Miscellaneous allowance expense = \$1000
 Non-taxable (55-010) - transportation = \$97.35
 TAXABLE (55-013) - (all other expenses) = \$7,159.65

EXPENSE REPORTS

PER DIEM RATES FOR RELOCATION

<p>§302-6.100 What am I paid under the actual TQSE reimbursement method?</p>	<p>The “maximum daily amount” of TQSE under the actual expense method that</p>		
<p>For:</p>	<p>You and/or your unaccompanied spouse¹ may receive is</p>	<p>Your accompanied spouse or a member of your immediate family who is age 12 or older may receive is</p>	<p>A member of your immediate family who is under age 12 may receive is</p>
<p>The first 30 days of temporary quarters.</p>	<p>The applicable per diem rate.</p>	<p>.75 times the applicable per diem rate.</p>	<p>.5 times the applicable per diem rate.</p>
<p>Any additional days of temporary quarters.</p>	<p>.75 times the applicable per diem rate.</p>	<p>.5 times the applicable per diem rate.</p>	<p>.4 times the applicable per diem rate.</p>

FIRST 30 DAYS W/SPOUSE & CHILD

RELOCA ER WITH SPOUSE AND CHILD [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Spelling Research Thesaurus Translate Proofing

New Comment Delete Previous Next Comments

Show/Hide Comment Show All Comments Show Ink

Unprotect Sheet Protect Workbook Share Workbook Track Changes Changes

PURPOSE: RELOCATION WITH SPOUSE AND CHILD

DATES of travel: Start 7/1/2010 End 7/30/2010 Time

Date	Location	Person l Car Miles	Mileag e (50¢)	Taxi/Bus /Shuttle/ Train	Airfare	Car Rental	Lodging	Meals & Incidenta l Expense	Meal Deduction (Enter as minus \$)	Meals Provided (B,L,D)	Registr- ation or training fee	Parking & Tolls	Misc.	Total	Notes
RESERVED - Job Paid/Direct Bills															
07/01/10			\$ -		\$ 1,138.00		\$ 2,700.00	\$ 56.00						\$ 3,838.00	
07/02/10			\$ -					\$ 56.00					\$ 2,082.50	\$ 2,138.50	P/D SPOUSE AND CHILD
07/03/10			\$ -					\$ 56.00					\$ 1,000.00	\$ 1,056.00	MISC ALLOWANCE
07/04/10			\$ -					\$ 56.00						\$ 56.00	
07/05/10			\$ -					\$ 56.00						\$ 56.00	
07/06/10			\$ -					\$ 56.00						\$ 56.00	
07/07/10			\$ -					\$ 56.00						\$ 56.00	
07/08/10			\$ -					\$ 56.00						\$ 56.00	
07/09/10			\$ -					\$ 56.00						\$ 56.00	
07/10/10			\$ -					\$ 56.00						\$ 56.00	
07/11/10			\$ -					\$ 56.00						\$ 56.00	
PERSONAL EXPENSE Deductions sheet		0	0	0	0	0	0	1064	0		0	0	0	\$ -	
WEB LINKS		0	\$ -	\$ -	\$ 1,138.00	\$ -	\$ 2,700.00	\$ 1,680.00	\$ -		\$ -	\$ -	\$ -	\$ 3,082.50	

- [Forms for Travel](#)
- [DOMESTIC Per diem rates](#)
- [FOREIGN per diem rates](#)
- [Meal Deduction table](#)
- [Foreign Currency Converter](#)

Charge Code:	PROJ	ORG	ACCOUNT	AMOUNT
	CFOFIN	CFO	6055-010	1,138.00
	CFOFIN	CFO	6055-013	7,462.50
Total to be Expensed				\$ 8,600.50

Total to be Expensed	\$ 8,600.50
Less: Direct Billed Items	\$ 3,838.00
Less: Traveler Advances	
Less: Other Reimbursements (Explain *)	\$ 4,762.50
Total owed to Traveler or Job	\$ -

Traveler hereby certifies that, except as otherwise noted, the information submitted on this expense report reflects only expenses incurred by the traveler during official business for JSA/Jefferson Lab on the dates shown. The Travel Expense Report reflects all discounts, reductions, trade-ins, or offsets whatsoever, which reduce the expense actually incurred.

Pay Third-party: Verified by & date

Written authorization from traveler is necessary to process with non-time, indefinitely, or effective start/end date indicated.

Traveler Signature _____ Date _____

NOTES: AF FOR SPOUSE 456.00 CHILD 226.00; LODGING FOR 30 DAYS @ 90.00 P/W
P/D FOR SPOUSE (@75%) 29.75*42=1249.50.00; P/D FOR CHILD (@50%) 29.75*29=833.00

Expense report Sample Completed Form Instructions for completing ER

Ready 70%

start AIM AIM 2 Fi... Wind... Remo... 4 Mi... Sent ... FTMS... 2 Mi... Docu... 10:41 AM

Questions & Answers

Q – TA can not be created because individual's name does not appear on drop down list.

A – The person may need to complete a tax form (W9 or W8), or they are not in Jlist they must Register.

Q – How soon before start date can the new hire arrive.

A – New Hire can arrive as early as they deem necessary. Their temporary lodging period (30 or 45 days) starts the first night they are here.

Q&A – Continued

- Q – Can a car be rented for the newly hired person?
- A – Car rental is authorized for up to 4 days when they arrive for a house hunting trip. No car rental is authorized when they come to start work.

- Q – How many cars will the JLab pay to relocate?
- A – Up to 2, both can be driven or one driven and one shipped.

- Q – Can I ship 2 cars and fly to Newport News?
- A – NO, cost of shipping one car will be covered by JLab

Q & A - Continued

Q – Is en-route lodging and per diem deducted from the 30 or 45 days temporary subsistence?

A – No, the number of en-route lodging and per diem days are determined by dividing the total # of miles to be driven by 300 (miles required per day).

Q – What expenses are not taxable to the new employee?

A – En-route transportation, tolls, parking, and lodging, moving supplies, and U.S. visa. Non-taxable relocation is charged to account 55-010.

Q & A - Continued

Q - Can a new hire receive an advance on expenses before they report to work?

A – Yes, when requested by the new employee and authorized by the hiring Division.

Q – Does JLab policy allow new hire to purchase their own airline tickets to relocate?

A – Yes, but it is not recommended. Too many rules apply to the relocation ticket purchase (such as one-way only, no en-route stop over's other than to change planes).

Q & A - Continued

Q – What relocation expenses are taxable to the employee?

A - Taxes are withheld on reimbursements for -

- Mileage in excess of the non-taxable rate.
- Tolls and parking.
- Storage of household goods in excess of 30 days up to a maximum of 45 days (after 45 days you pay for all storage costs).
- Per Diem up to 45 days for each family member.
- Temporary lodging up to 45 days.
- Miscellaneous expense allowance (including vehicle storage charge)
- Closing costs on Sale or Purchase of residence.
- House hunting trip expenses.

Taxable relocation expenses are charged to account 55-013.

IN CONCLUSION

- Process once a candidate accepts an offer from JLab
- Policies for regular, term, and post-doc employees
 - Procedures TA for House hunting trip
 - TA for Travel and Temporary Subsistence
 - ER for House hunting trip
 - ER for Travel to JLab by Employee and Spouse
 - ER for temporary subsistence for Employee w/Spouse & Child
- Questions & Answers