



National Aeronautics and  
Space Administration

**NASA Shared Services Center**  
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[www.nssc.nasa.gov](http://www.nssc.nasa.gov)

## **NASA Shared Services Center Service Delivery Guide**

**NSSC-FM-SDG-0002 Revision C**

**Effective Date:** February 2, 2009  
**Expiration Date:** February 2, 2014

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# **Change of Station**

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**Responsible Office: Financial Management**

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**Approved by**

/s/ Kenneth L. Newton  
Joyce Short  
Deputy Director

February 11, 2009  
Date

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### DOCUMENT HISTORY LOG

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Status (Basic/Revision Cancelled)	Document Version	Effective Date	Description of Change
Basic		01/25/05	Basic Release
Revision	A	06/01/07	Added flow chart, changed IG acronym to CS
Revision	B	05/12/08	Re-titled from "Permanent Change of Station" to "Change of Station" to encompass Temporary Change of Station, refined wording of various processes including storage of proposal information and to incorporate use of mLINQs software
Revision	C	2/23/10	Updated expiration date from 2010 to 2014 to reflect NASA 5-year expiration. NSSC SDD reviews annually. (No signature required for admin change.)

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## PROCESSING CHANGE OF STATION VOUCHERS

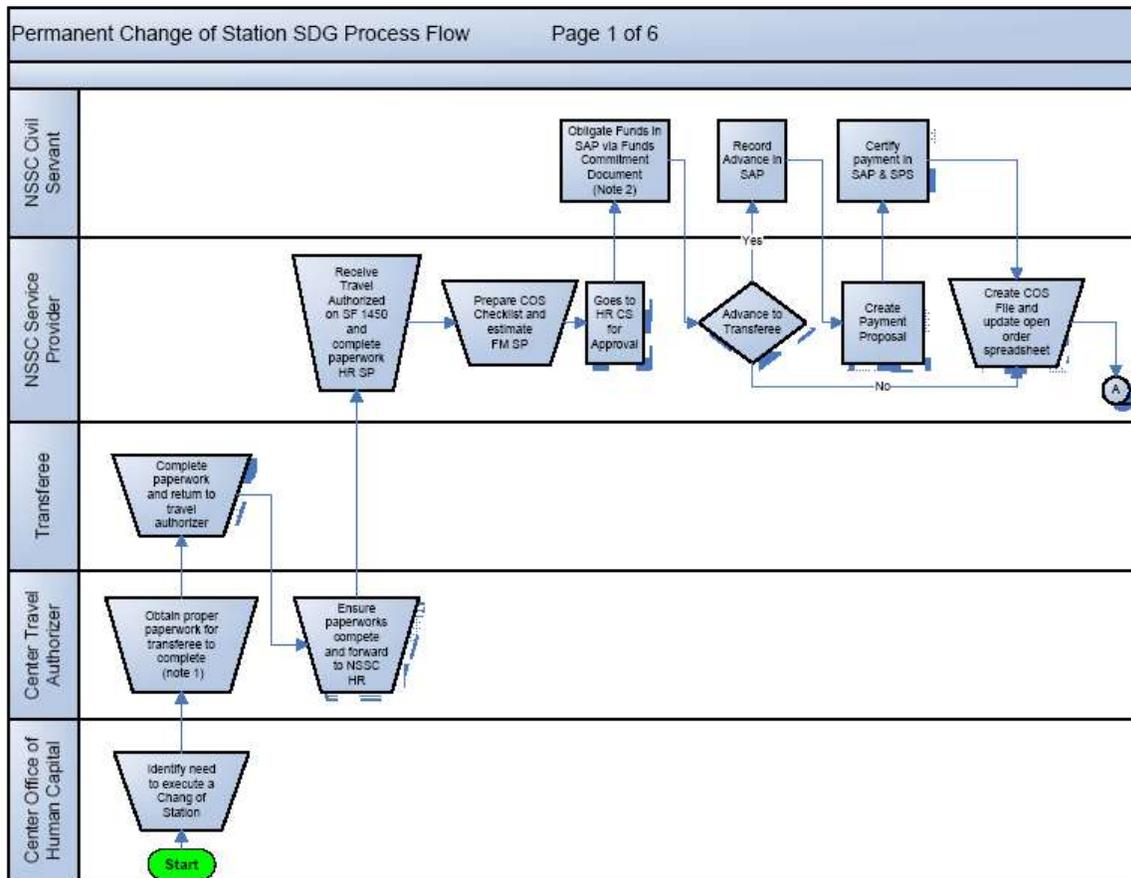
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### Introduction

The NSSC provides advice and assistance to employees completing PCS, First Duty and TCS travel vouchers for the Agency. In addition, the NSSC is responsible for reviewing, auditing, calculating, obligating funds, entitlements and reconciling travel vouchers. To provide efficient and timely service the NSSC will work closely with the requesting Center to ensure that payments meet the employee's plans and requirements.

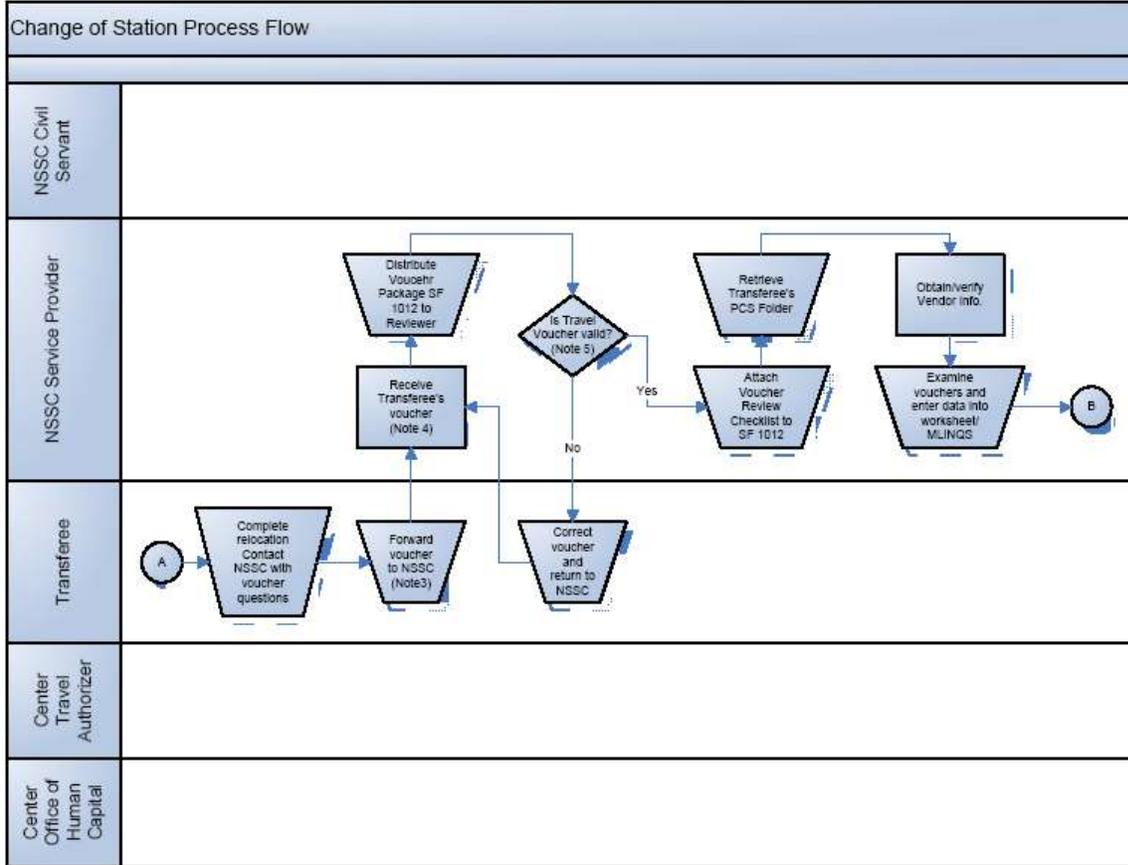
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## PROCESS-Processing Change of Station Vouchers

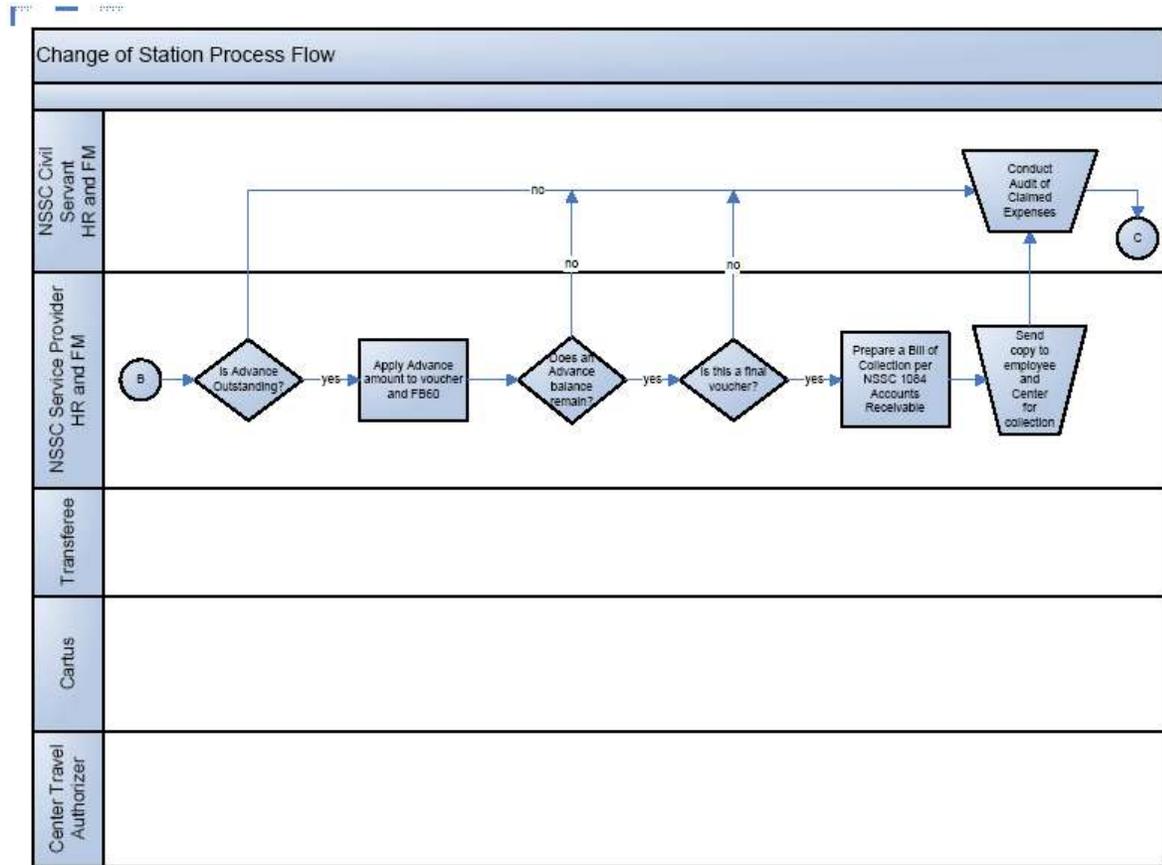


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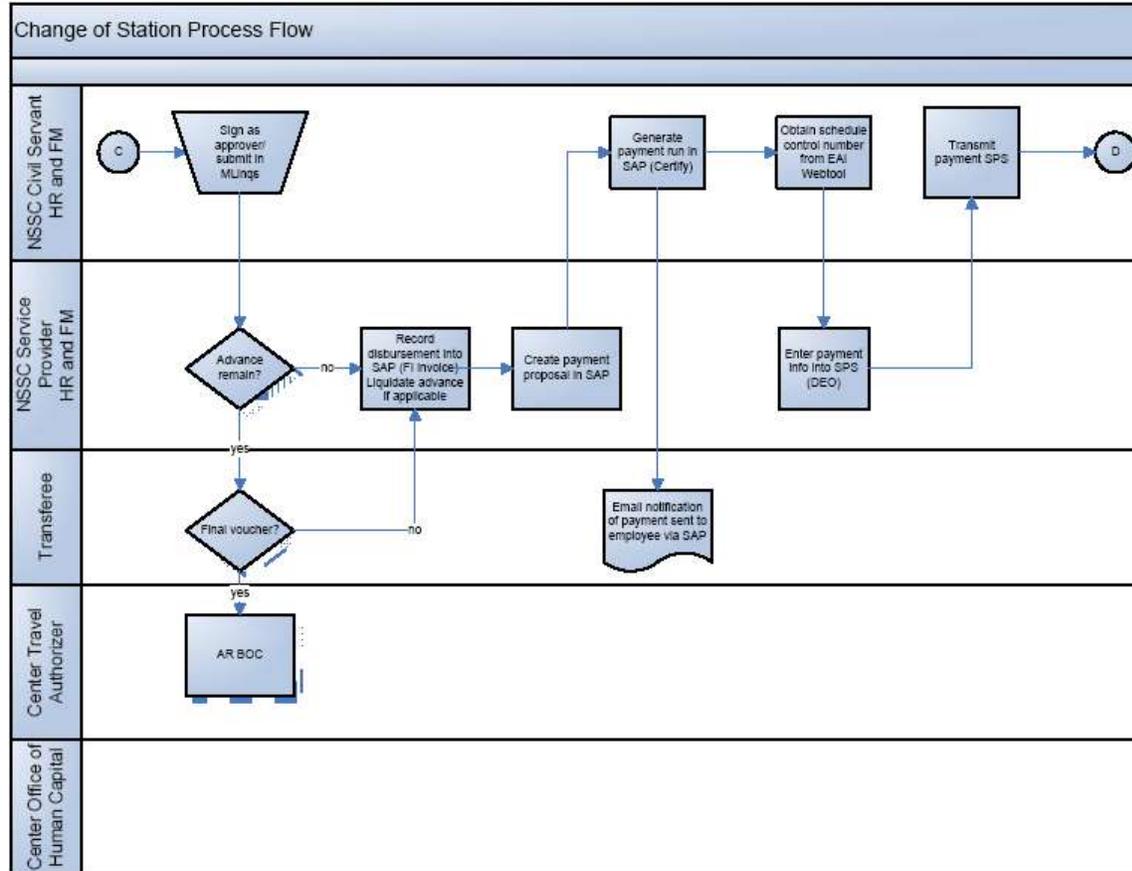
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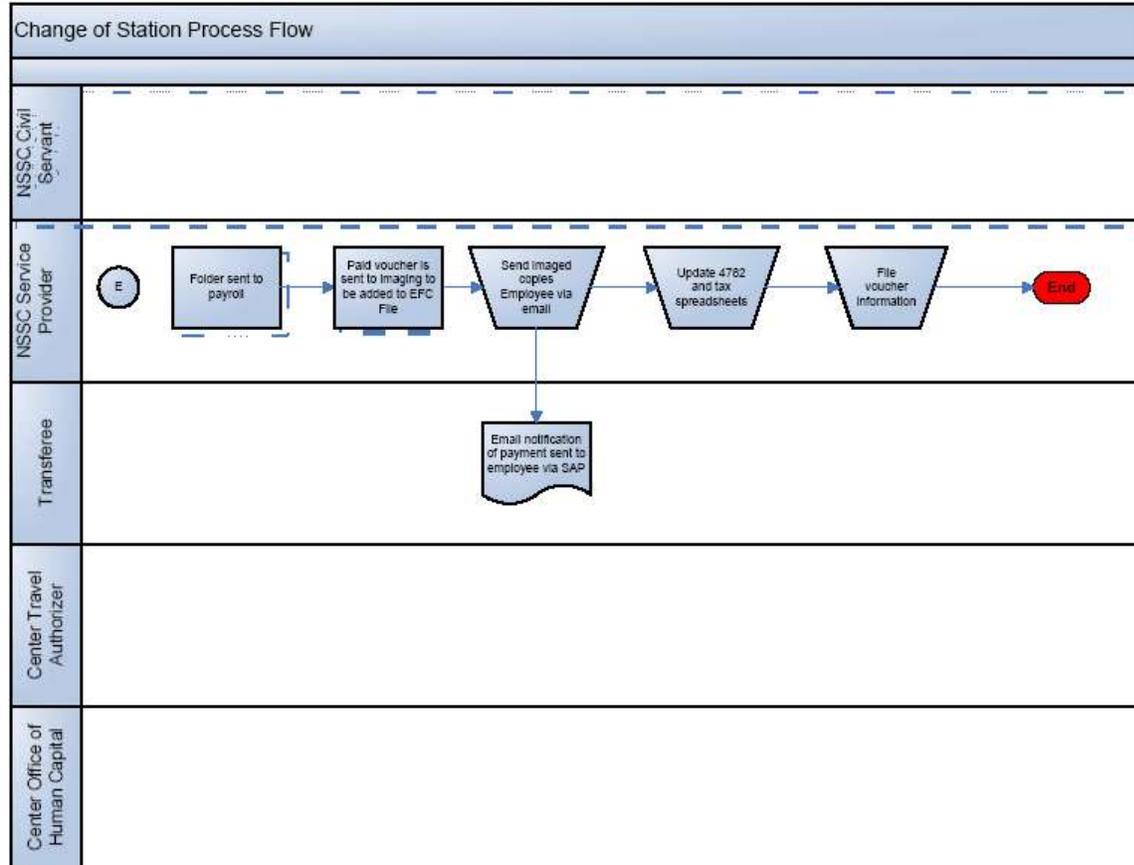
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Change of Station Process Flow

COS Notes

**Note 1:** Travel Authorizer role may be performed by the Office of Human Capital Specialist. Contact NSSC Travel for assistance in obtaining proper paperwork. Cartus completes the paperwork listed below

- Copy of Authorization
- NF 1449
- SF 1450
- Service Agreement
- Binding Decision (Transferee and NASA Flex Act)
- WTA Agreement (Transferee and NASA Flex Act)
- POV Shipping Estimate (if shipping POV)

**Note 2:** MUST have signed SF 1450. Send funding worksheet to the Center Travel Authorizer to keep as a record.

**Note 3:** Forward SF 1012 (Travel Voucher) and the proper Receipts.

**Note 4:** NSSC Records Management will receive voucher, scan documents and forward Remedy Ticket to NSSC Travel POC.

**Note 5:** Ensure voucher has the correct information and meets Prompt Pay requirements (if applicable).

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## Roles & Responsibilities

Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
Step 1  <b>NSSC Travel(SP)</b>  Receive Travel Authorization and related paperwork	Receive properly completed and date stamped travel orders from FM-COS Assistance Technician (via the Remedy) which includes: <ol style="list-style-type: none"> <li>1) NF 1449</li> <li>2) NF 1450</li> <li>3) Service Agreement</li> <li>4) Binding Decision (for Transferee and NASA Flex Act only)</li> <li>5) WTA Agreement (for Transferee and NASA Flex Act only)</li> <li>6) POV Shipping Estimate/Cost Comparison (if shipping Privately Owned Vehicle)</li> <li>7) Pre-move survey to estimate cost of moving household goods</li> </ol> <p>If all information required to process orders is present, prepare cost estimate. If information is not present, contact COS Assistance Team and request additional information required. Retain a file copy of the email for prompt payment purposes. Once completed package is received, go to next step.</p> <p><b>Output:</b> Validate that all information required to prepare cost estimate is present.</p>	
Step 2  <b>NSSC Travel (SP)</b>  Prepare COS checklist	a. In SAP print hardcopies of each of the following: <ol style="list-style-type: none"> <li>1) Vendor number assigned to employee—match social security number to Form 1449 to ensure that it is correct employee and match Receiving Center ID to Payment Meth Supplement and to NF1450 to ensure it is correct vendor number for this travel authorization. Write vendor number in the top center margin of NF 1450.SAP Modules: (XK01 Create) (XK02Change) (XK03 Display)</li> </ol>	

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Roles and Responsibilities	Action	Tips/Notes
	<p style="text-align: center;">2) Banking information (XK03)</p> <p>b. Using Rand McNally (<a href="http://www.randmcnally.com">www.randmcnally.com</a>) select “Maps and Directions” then “Online Driving Directions”, print driving directions showing total estimated driving distance.</p> <p>c. 1575 Form filled out for part 3 of folder</p> <p>d. Complete NSSC Travel Office Change of Station Checklist to document completion of all of the steps above-</p> <p>e. Prepare estimate in moveLINQ (See Appendix N) and print out auto-generated authorization.</p> <p>f. Route Remedy parent ticket to approver (L3-Change of Station)</p> <p>g. Take to FM-CS for approval. If approved, 1450 will be signed. Go to next step.</p> <p><b>Output:</b> Completed COS checklist, Cost Estimate and Signed 1450.</p>	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
Step 3  <b>NSSC Travel (CS)</b>  Obligate funds in SAP via funds commitment document	a. FM-CS routes Remedy parent ticket to FM-CS L3 funding POC.  b. FM-CS Approver takes approved travel authorization package to FM-CS to obligate the funds by SGL account in SAP. To obligate funds:  1) Access FMZ1 in SAP. 2) Input TP as document type 3) Input SAP journal entry generated by Estimating Station. 4) Click “Checks & Balances” key on toolbar and ensure that journal entry balances to worksheet. 5) Document “400” document number on the mLINQ estimate report and on the NF 1450.  c. Email appropriate parties that funding has been committed with a copy of the mLINQ estimate. Appropriate parties include the “Requestor” from the HR web form and Funding contact. Include the “400” document number from SAP in the email as reference.  d. Update moveLINQ with 400# and check vendor number. If it is “xxxx”, update with SAP vendor number. Then submit authorization in moveLINQ.  <b>Output:</b> Funds obligated	MUST have signed SF 1450. Send funding worksheet to the Center Travel Authorizer to keep as a record.
Step 4  <b>NSSC Travel (SP)</b>  Advance to transferee	a. Receive request for advance. Issue advance only if necessary and following FTR guidelines.  <b>Output:</b> Advance amount determined	FTR 302-2.21 Advance  Encourage use of Government Credit Card

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
Step 5 <b>NSSC Travel (CS)</b> Record advance in SAP	a. Post 1700# in SAO for authorized amount of advance  <b>Output:</b> Advance recorded in SAP	Reference: Current OLQR Instructions for recording of advances in SAP
Step 6 <b>NSSC Travel (SP)</b> Create Advance payment proposal and enter into SAP/SPS	a. Create advance payment proposal following instructions at Step 22.  <b>Output: Advance</b> Payment proposal entered into SAP/SPS	
Step 7 <b>NSSC Travel (CS)</b> Certify payment in SAP and SPS	a. Certify advance payment in SAP and SPS following instructions in Steps 24 – 28.  <b>Output:</b> Payment certified	
Step 8 <b>NSSC Travel (SP)</b> Create COS file and update open order spreadsheet	a. Receive travel order documents from FM-CS after funding has been established. b. Create six part folder and file travel order documents as follows: <ol style="list-style-type: none"> <li>1) Part 1 = copy of map</li> <li>2) Part 2 = NF1450, NF1449 and other supporting paperwork (except SAP information).</li> <li>3) Part 3 = NF1575 (used to track actual payments of expense vouchers). Fill in Traveler name, SSN, EOD, TA#, Dependents (If married, put spouse's name, and if applicable dependent children's names and DOB).</li> <li>4) Part 4 = Leave blank in initial setup; paid travel vouchers will be filed here later.</li> <li>5) Part 5 = SAP vendor information. If this information has already been printed, double check in SAP again and print if different (initial and date the new copy). See instructions below for printing information from SAP. If existing copy is correct, initial and date. Put banking</li> </ol>	

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Roles and Responsibilities	Action	Tips/Notes
	<p>information on top for verification purposes when working vouchers. Part 5 also contains the Funding estimate printout from moveLINQ.</p> <p>6) Part 6 = Print FPPS info and place here. Put banking screen info on top for ease of verification while working vouchers.</p> <p>c. In SAP (XK03), retrieve and print vendor information for the traveling employee. (Enter vendor number and check box in upper left and corner to print all information.) Print first five pages. Note whether or not there is more than one banking account. If so, make sure the banking account used for travel reimbursement is the payroll account, marked with a <b>P</b>. Contact employee to see if we can remove the account without the <b>P</b> as not to have payment made to wrong account. Initial and date the printed copy of SAP information.</p> <p>d. Prepare file label indicating employee name, last name first with separate label indicating the Receiving Center. If First Duty, put sticker on outside of file identifying file as 1<sup>st</sup> duty.</p> <p>e. Scan file and create EFC file in Tech Doc.</p> <p>f. 1450 is distributed to Traveler and Web requestor via email.</p> <p>g. Remedy ticket COS Status is marked as Distribution Complete and resolved.</p> <p><b>Output:</b> File created / Spreadsheet updated / Orders distributed</p>	
<p>Step 9</p> <p><b>NSSC Travel (SP)</b></p> <p>Receive Travel voucher</p>	<p>a. Receive properly completed <i>and date stamped</i> voucher package (usually standard form 1012 and 1012a) with supporting receipts and documents from employee <i>via the Document Control Center</i>. Ensure that the employee's mailing address (at Receiving Center), phone number, signature and date are on Form 1012. Form needs to be returned for correction if</p>	<p>a. NSSC Document Management will receive vouchering electronic format and forward via Remedy Ticket to NSSC Travel</p>

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Roles and Responsibilities	Action	Tips/Notes
	<p>traveler's signature is not present.</p> <p>b. If all information required to process voucher is present, begin review the voucher. If information is not present, contact employee and/or center via email to request additional information required. Retain a file copy of the email for prompt payment purposes. Begin voucher review once all paperwork is received.</p> <p><b>Output:</b> Travel voucher received from NSSC Document Management</p>	POC.
<p>Step 10</p> <p><b>NSSC Travel (SP)</b></p> <p>Determine if there are any outstanding advances</p>	<p>a. If no outstanding advance, advance to step 21.</p> <p><b>Output:</b> Outstanding advance yes/no</p>	
<p>Step 11</p> <p><b>NSSC Travel (SP)</b></p> <p>Verify FPPS information</p>	<p>a. Change remedy ticket to Work in Progress</p> <p>b. Obtain current FPPS information showing tax and retirement information (see separate instructions). If employee is FERS, from the "levw" screen, print a hard copy of current pay period OASDI and YTD OASDI amounts and put in "Info" tab in the excel workbook.</p> <p><b>Output:</b> Current FPPS printed</p>	
<p>Step 12</p> <p><b>NSSC Travel (SP)</b></p> <p>Attach Voucher Review Checklist to SF 1012</p>	<p>a. Ensure that the employee's mailing address (at Receiving Center), phone number, signature and date are on Form 1012. Form needs to be returned for correction if traveler's signature is not present.</p> <p>b. Retrieve employee PCS folder. Ensure that folder is for the correct Travel Authorization number. Occasionally there will be more than one.</p> <p>c. If there are no travel orders on file, check with FM-COS Assistance Team. The voucher may</p>	

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Roles and Responsibilities	Action	Tips/Notes
	<p>have arrived before the travel orders. Hold until Travel Orders have been received, approved, and obligated in SAP. If folder is present, proceed to next step.</p> <p><b>Output:</b> SF 1012 with PCS Folder</p>	
<p>Step 13</p> <p><b>NSSC Travel (SP)</b></p> <p>Examine voucher and enter data into worksheets</p>	<p>Examine voucher for propriety of expenses by comparing to entitlements authorized on NF1450. See appropriate Appendix for examining each of these types of vouchers:</p> <ol style="list-style-type: none"> <li>1) House Hunting Trip Fixed</li> <li>2) House Hunting Trip Actual</li> <li>3) En Route</li> <li>4) Miscellaneous (Fixed or Actual)</li> <li>5) Temp Quarters Fixed</li> <li>6) Temp Quarters Actual</li> <li>7) Home Marketing Incentive</li> <li>8) House Hold Goods</li> <li>9) Lease Break</li> <li>10) Property Management</li> <li>11) Real Estate (Sale / Purchase)</li> </ol> <p><b>Output:</b> Examined voucher ready for FB60 to be completed.</p>	
<p>Step 14</p> <p><b>NSSC Travel (SP)</b></p> <p>Determine if final voucher has been submitted</p>	<p>If advance balance remains but final voucher has not been submitted, advance to step 21.</p> <p><b>Output:</b> Balance due yes/no</p>	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
Step 15 <b>NSSC Travel (SP)</b> Prepare bill for collection	a) Email employee the backup materials to prove bill of collection amount and let them know a BOC will be forthcoming from NSSC AR. b) Create CR in Remedy and send AR team details to create BOC. Also attach the AR-IDRF to the CR, which gives posting details for the BOC. c) Post BOC amount on spreadsheet kept by Travel Dept. <b>Output:</b> Bill prepared and ready to be sent to transferee	
Step 16 <b>NSSC Travel (SP)</b> Verification before audit	a. Fill in the FB60 worksheet <ol style="list-style-type: none"> <li>1) Use the SAP documentation and the NASA Form 1450</li> <li>2) Mark the top of the worksheet with the type of voucher code. Example: Employee En Route “<u>EE</u>”.</li> <li>3) The date that the NSSC received complete voucher should match on the FB60 worksheet in blocks “Invoice Date” and “Date of Receipt”.</li> </ol> b. For processing in moveLINQ, see Appendix M. Information Sheet (from the PCS Worksheet 1st tab). <ol style="list-style-type: none"> <li>1) Check to see if correct information from the NASA 1450.</li> <li>2) Use FPPS information to verify for retirement system and State (screen pdvw).</li> </ol> c. Determine from FPPS information printed the day the voucher is worked, if the FICA limit has been reached. The Info tab sheet should have current figures on it, and it should show if traveler is over the calendar year FICA limit. <ol style="list-style-type: none"> <li>1) Check FICA limit based on current IRS</li> </ol>	

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Roles and Responsibilities	Action	Tips/Notes
	<p>rules for salary tax liability (For current year).</p> <p>2) "X" the FICA Block and initial on the PCS Worksheet. If over the FICA limit for the calendar year, also "X" the CSRS box, to not withhold FICA from the voucher being paid.</p> <p>d. Type name and Date bottom left of the Relocation Worksheet.</p> <p>e. Assign Remedy ticket to FM-CS member responsible to audit voucher</p> <p><b>Output:</b> Travel Voucher ready for audit</p>	
<p>Step 17</p> <p><b>NSSC Travel (CS)</b></p> <p>Conduct audit of claimed expenses</p>	<p>a. Verify Entitlement in reference to the type of move on the NASA Form1450.</p> <p>1) First Duty (En Route, HHG)</p> <p>2) FDS 5 USC 9811 -NASA Flex Act (House Hunting, En Route, HHG, TQ, Real Estate)</p> <p>3) PCS Transfer (En Route, Misc Expense, House Hunting, HHG, TQ, Real Estate)</p> <p>4) TCS Temporary Transfer (En Route, House Hunting, HHG, TQ)</p> <p>5) SES Last Move Home (En Route, HHG)</p> <p>b. Refer to block 24 Remarks for additional information on the NASA Form1450.</p> <p>c. Ensure the dates of the claim are within agreement of the NASA Form 1450.</p> <p>1) All entitlement must be after the Service Agreement Signed date.</p> <p>2) Employee House Hunting must be taken prior to the EOD</p> <p>3) Spouse House Hunting must be taken prior to spouse's En Route.</p> <p>4) Household Goods date is before the Enter on Duty (EOD) date and after the Service Agreement Signed date.</p> <p>5) Verify for members with HMI do not exceed 60 days for TQ.</p> <p>6) Verify if member extended their TQ beyond 60 days then the HMI is withdrawn.</p>	

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Roles and Responsibilities	Action	Tips/Notes
	7) HMI Approved from HR and Logged on the NASA 1450.  d. Verify you have the following:  1) Verify Name, SSN, Reason for claim, TA#.	
Step 18  <b>NSSC Travel (CS)</b>  Travel voucher rejection	a. If no discrepancies go to step 22.  b. Auditor determines discrepancies and returns voucher to FM-SP for correction. Route remedy ticket back to FM-SP with errors noted.  1) SP makes noted corrections and returns to FM-CS for audit. Routing Remedy ticket back to FM-CS.  <b>Output:</b> Audited voucher ready for payment	
Step 19  <b>NSSC Travel (CS)</b>  Auditor approves, signs, and dates, travel voucher	a. Auditor approves, signs, and dates travel voucher. b. If voucher was worked in moveLINQ, submit the voucher. c. Assigns Remedy ticket back to FM-SP with voucher approved in the Activity Log  <b>Output:</b> Approved travel voucher	
Step 20  <b>NSSC Travel (SP)</b>  Record disbursement into SAP (FB60 - FI Invoice)	a. Basic data tab, complete using the FB60 worksheet.  1) Vendor. 2) Invoice Date (date completed voucher received by NSSC). 3) Reference: <u>Abbreviation of voucher type (ex: EE, FM, ATQ1, etc).</u> 4) Amount: net payment to traveler 5) Text: TA #. 6) Invoice Receipt Date (same as invoice date). 7) Document Type ZU ( <u>COS</u> ) Voucher (use drop down).	

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	<ol style="list-style-type: none"> <li>8) When you choose ZU, the Vendor name appears to the right. Click the “puzzle piece” icon to go to Vendor screen.</li> <li>9) This will bring you to another screen- press enter until you see the banking.</li> <li>10) Under the Vendor/Address select button, check banking against FPPS information: 01 Checking /02 Savings; P (Payment type downloaded from FPPS).</li> <li>11) Complete the information at the bottom.</li> <li>12) GL/acct... (6100.2123 etc.).</li> <li>13) Amount in doc.curr...\$...</li> <li>14) Right scroll to cost center. (510PCPCS).</li> <li>15) Order.(FC000000).</li> <li>16) Right scroll to Earmarked (400197299).</li> <li>17) Line Item (1 or 2 ...etc.)</li> </ol> <p>b. Payment Tab</p> <ol style="list-style-type: none"> <li>1) NT30.</li> <li>2) P Payment.</li> <li>3) Pmnt meth.supl. <u>XX</u> Center Code, example 10, 72 etc.</li> <li>4) Pmnt Block <u>Free for payment.</u></li> <li>5) Part Bank *Note* If member has two accounts, verify with member on which account to use. Select the FPPS account P instead of the default travel account. (Should be done at the time the folder is created).</li> <li>6) Check Bal. at the top right, if not zero work the difference.</li> <li>7) Simulate.</li> </ol> <p>c. At the Document Overview screen.</p> <ol style="list-style-type: none"> <li>1) Final Check.</li> <li>2) Post.</li> </ol> <p>d. Write the Document 19XXXXXXX number given, initial and date/time at the bottom bar on the FB60 worksheet (Document 19XXXXXXX was posted in company code NASA.)</p> <p>e. Put 1900# in Remedy ticket Activity Log and in Travel Tab, resolve ticket</p> <p>f. Take posted voucher to COS Lead, to prepare for payment process.</p>	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
	<p><b>Output:</b> Posted voucher in SAP / Remedy ticket resolved</p>	
<p>Step 21</p> <p><b>NSSC Travel (SP)</b></p> <p>Create payment proposal spreadsheet</p>	<p>a) Arrange folders in stacks by center. b) Verify all folders are present by comparing to SLA spreadsheet</p> <p><b>Output:</b> Payment ready to be created</p>	
<p>Step 22</p> <p><b>NSSC Travel (SP)</b></p> <p>Create payment proposal in SAP</p>	<p>a. T-Code:ZF110_PRO</p> <p>b. Status Tab.</p> <p>c. Run date –mm/dd/yyyy today's date.</p> <p>d. Identification Center – <u>XXXXXX</u> (sample - NSHQP, NSJSP, etc).</p> <p>e. Parameter Tab.</p> <p>f. Company Code – <u>NASA</u> (always).</p> <p>g. Pmt meths- <u>P</u> EFT or <u>C</u> check.</p> <p>h. Next p/date – (30 days from the run/posting date).</p> <p>i. Vendor – <u>mass pull 1 - 99999</u></p> <p>j. Free Selection Tab</p> <p>k. Field Name – <u>Business area</u>.</p> <p>l. Value – <u>XX</u> (10, 62 ext. center code).</p> <p>m. Field Name – Voucher type</p> <p>n. Value: ZU</p>	

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Roles and Responsibilities	Action	Tips/Notes
	<ul style="list-style-type: none"> <li>o. Additional Log Tab.</li> <li>p. Check required logging type boxes. (1<sup>st</sup>, 2<sup>nd</sup> &amp; 4<sup>th</sup>)</li> <li>q. Due Date Check.</li> <li>r. Payment method selection in all cases.</li> <li>s. Line items of the payment documents.</li> <li>t. Vendors (from/to).</li> <li>u. 1 tab <u>99999</u>.</li> <li>v. Return to the Status tab.</li> <li>w. Save Data? <u>Yes</u>.</li> <li>x. (If you have the need to exit the program to return select ZF110 PRUN- Payment Run Only for F110).</li> <li>y. Select the <u>Proposal</u> Button (top left).</li> <li>z. Schedule Proposal.</li> <li>aa. check box Start immediately.</li> <li>bb. Select check at the bottom left of screen.</li> <li>cc. Status - "Proposal is ready to be started."</li> <li>dd. Enter until it "Payment proposal has been created" is displayed.</li> <li>ee. Proposal eye glasses button (second) to display.</li> <li>ff. Display Payment Proposal: Payments.</li> <li>hh. Click the print button also, to get summary of all payments</li> </ul>	

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Roles and Responsibilities	Action	Tips/Notes
	<ul style="list-style-type: none"> <li>ii. Arrow back.</li> <li>jj. Click the scroll, and print using the print button. Print to "MAIL" instead of a printer. This will give detailed printout of the proposal in a soft copy. It will be in the SAP Outbox.</li> <li>kk. Back arrow</li> <li>ll. Click, Edit, Proposal, Proposal List, page down to last screen, then hardcopy. This will give the total amount of the proposal, which will tie to the hardcopy on the eyeglass button; Print hardcopy of this screen.</li> <li>mm. Back arrow.</li> </ul> <p><b>Output:</b> SAP payment proposal created</p>	
<p>Step 23</p> <p><b>NSSC Travel (SP)</b></p> <p>Reconciling Payment Proposal</p>	<p>For each center, the following is done:</p> <ul style="list-style-type: none"> <li>a. Payments are matched up to make sure all vouchers are paid and all travelers are on the proposal.</li> <li>b. Once it is reconciled, retrieve the soft copy in the SAP Outbox. Save the file in a temporary file on your computer desktop. Then upload into Tech Doc.</li> <li>c. Open Tech Doc. Go To FM/TPP/Proposal Logs</li> <li>d. You will see a list of all centers</li> <li>e. Go to the center you are needing to upload a log for</li> <li>f. Click Create Document</li> <li>g. Name/Number: use following naming scheme: FM_TPL_CCC_MM-DD-YYYY_HH.MM</li> <li>h. Description/Title use the following naming scheme: CCC PROPOSAL LOG MM-DD-</li> </ul>	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
	YYYY  i. Doc Type: SM-Supporting Material – Spreadsheets Maps  j. Doc Category: PrivAct  k. Uncheck box to add self to distribution list  l. Uncheck box to add self to Notification list  m. Point of Contact: your name  n. Organization: FM  o. Web Search: Campus  p. Reason: New Proposal Log; NEXT  q. Only fill in NASA Center; NEXT  r. Click Browse: find file on desktop to upload; OK  s. Choose the file; OPEN  t. OK  u. NEXT  v. Choose FM-PCS-READ, click the Read box, and Add  w. Choose FM-PCS-Owner, click the Owner box, and Add; NEXT  x. REMOVE ALL  y. NEXT  z. OK – you will see a screen stating the file was successful  aa. Click Release  bb. Revision 1.0 (or next number up)	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
	cc. Reason: New Log  dd. OK  ee. You will get a notice that the file was released  ff. Proposals are now taken to the Certifying Officer for the day. The log file is uploaded, so if they need to review in the certifying process , it is there.  <b>Output:</b> Proposals reconciled.	
Step 24  <b>NSSC Travel (CS)</b>  Certify payment run in SAP	a) ZF110 PRUN- Payment Run Only for F110. b) Select Run date (drop down). c) Status. d) Proposal eye glasses button (3 <sup>rd</sup> button from the left) to display. e) Display Payment Proposal: Payments f) verify \$ and vendor # g) hardcopy screen (last button on the toolbar) h) arrow back  i) Payment Run (2 <sup>nd</sup> button on left).  j) Schedule Proposal k) check box Start immediately l) select check at the bottom left of screen and press enter.  m) Wait a few seconds and press enter n) Verify correct #'s for "Posting orders: # generated, # completed". o) Hard copy screen.  p) Edit (from the file menu, on the main screen). q) Payments. r) Payment list.	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
	<ul style="list-style-type: none"> <li>s) Select the check on the List Variant screen, Payment list will appear</li> <li>t) Program – <u>ZXXXXX</u> Must have a Z to perform email notification.</li> <li>u) Check the number of payments.</li> <li>v) Verify the \$ (Bottom, * Treasury).</li> <li>w) Print (not hardcopy).</li> <li>x) Continue.</li> <li>y) Do you want to send an email? <u>YES.</u></li>   <li>z) Payment List – Print (Not Hardcopy)</li>   <li>aa) Continue – Payment settlement list will print.</li>   <li>bb) Back arrow.</li>   <li>cc) Environment</li> <li>dd) Payment medium.</li> <li>ee) DME administration</li>   <li>ff) Data Medium Overview</li> <li>gg) Hardcopy.</li> <li>hh) Verify \$.</li> <li>ii) Put cursor in amount block.</li> <li>jj) Select Payment summary print (3<sup>rd</sup> button from the left).</li> <li>kk) Continue.</li> <li>ll) Payment summary prints out.</li> <li>mm)        Back arrow (2x).</li>   <li>nn) If you need to run another – select Run date and repeat steps.</li>   <li>oo) When complete –wait 30min and go to I-View – EAI Webtool for the schedule number.</li>   <li>pp) <b>Output:</b> Payment run certified</li> </ul>	

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Process 1 –(Processing of Change of Station Travel Vouchers)		
Roles and Responsibilities	Action	Tips/Notes
Step 25  <b>NSSC Travel (CS)</b>  Obtain schedule control number from EAI web tool	<ol style="list-style-type: none"> <li>1) Insert card into card reader</li> <li>2) IVIEW - <a href="https://iview.ifmp.nasa.gov">https://iview.ifmp.nasa.gov</a></li> <li>3) IEM Application (button bar top)</li> <li>4) EAI Web Tool ( Left box -IEMP Reference Tools and Utilities)</li> <li>5) Select Center</li> <li>6) Production</li> <li>7) 12A Pre-Edit Report</li> <li>8) Data Files               <ol style="list-style-type: none"> <li>1) Select Data File</li> <li>2) View Data</li> <li>3) Page setup – Landscape</li> <li>4) Print</li> <li>5) Close out</li> </ol> </li> <li>9) Log off of PC and remove card.</li> </ol> <p><b>Output:</b> Schedule control number</p>	
Step 26  <b>NSSC Travel (SP)</b>  Obtain schedule control number from SAP	<ol style="list-style-type: none"> <li>a) Paid vouchers are returned to COS Lead, to obtain Schedule numbers from SAP</li> <li>b) In SAP, go to T-code ZSE16_FMTC_SCHNO. This is the Daily Schedule Number screen.</li> <li>c) Click the first button</li> <li>d) Put the date of the proposals in the LAUFD field</li> <li>e) Put NS**P in the LAUFI field</li> </ol>	

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	<ul style="list-style-type: none"> <li>f) Click the clock or press F8.</li> <li>g) This gives you the schedule numbers for each PCS payment proposal for the day</li> <li>h) Write the appropriate schedule number on each voucher paid</li> <li>i) Vouchers are then put in order, for imaging</li> <li>j) 1575 card is update in PCS folder</li> <li>k) Mark 1450 with “F” when entitlement is finalized.</li> <li>l) Scan file and add to appropriate area of EFC file from Tech Doc.</li> <li>m) Email out copy of paid vouchers to employee via the NSSC COS-Travel mailbox using standardized wording.</li> <li>n) 4782 Update: If payments have been made in the current calendar year, pull up the existing spreadsheet and update with current payment amounts. If no payments have been paid in this calendar year, retrieve appropriate RITA.xls or NO RITA.xls (first duty) 4782 master spreadsheet and save using employee’s last name, first name and TA number as the file name.</li> <li>o) Cover sheet is put on top, and is sent to Payroll, to document tax info to upload to DOI</li> <li>p) Once Payroll returns file, it is double checked in Tech Doc (EFC File) and then filed away.</li> </ul> <p><b>Output:</b> Schedule control number; voucher is imaged, emailed out, and 4782 is updated.</p>	
<p>Step 27</p> <p><b>NSSC Travel (SP)</b></p> <p>Enter payment information into SPS</p>	<ul style="list-style-type: none"> <li>a. Insert ci key into USB drive.</li> <li>b. SPS <a href="https://sps.fms.treas.gov/">https://sps.fms.treas.gov/</a>.</li> <li>c. Create (2<sup>nd</sup> paper button from left).</li> <li>d. Schedule Type (drop down)</li> </ul>	

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Roles and Responsibilities	Action	Tips/Notes
	<p>Summary Continue</p> <p>e. Input Information from the Pre edit Schedule file.</p> <ol style="list-style-type: none"> <li>1) Office Number (ACC) – <u>use the dropdown arrow to choose correct ALC</u> (Refer to the ALC for Centers listing).</li> <li>2) Schedule Number – <u>51221018</u> Leave off the zeros in the beginning.</li> <li>3) Total Number of Payments – <u>#</u> items.</li> <li>4) Payment Date – <u>The payday</u> the next business day /Monday/The day after a holiday.</li> <li>5) Summary Type Code – <u>Travel (T)</u> or <u>EDI/EFT/CTX(Z)</u>.</li> <li>6) Sub Type Code - <u>Check or EFT (E)</u>.</li> <li>7) Control Number – <u>CXXXXXX</u>.</li> <li>8) Symbol <u>//////</u> (7x).</li> <li>9) Amount <u>\$</u>.</li> <li>10) Verify all information.</li> <li>11) Save Button (2<sup>nd</sup> Left).</li> <li>12) Ok Summary Saved.</li> <li>13) Initial and write the pay date on the Pre edit Schedule sheet.</li> </ol> <p>f. Back arrow, input additional schedules in needed repeat instruction 3.</p> <p>g. Highlight all schedule numbers: Status Submit CO</p> <p>h. Log out - use the running man button.</p> <p>i. Confirm – Yes.</p> <p>j. Log off of PC and remove ikey.</p> <p><b>Output:</b> SPS payment information entered</p>	

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Roles and Responsibilities	Action	Tips/Notes
<p>Step 28</p> <p><b>NSSC Travel (CS)</b></p> <p>Transmit payment per NSSC FI 1200 Accts Pay in SPS</p>	<ol style="list-style-type: none"> <li>a. Insert card into card reader.</li> <li>b. Log on to SPS - Secure Payment System Application.</li> <li>c. Highlight the Schedule Number from the CO Main Screen one at a time.</li> <li>d. Select the Certify View button (top, 4<sup>th</sup> button from the left).</li> <li>e. Screen: Certify Schedule – use the Pre-edit Report and check.               <ol style="list-style-type: none"> <li>1) Total Amount.</li> <li>2) Office Number (ALC) should co-inside with the center (ALC for Centers).</li> <li>3) Schedule Number.</li> <li>4) Total Number of Payments.</li> <li>5) Payment Date.</li> <li>6) Summary Type Codes.</li> <li>7) Sub-Type Codes.</li> <li>8) Control Number.</li> <li>9) Print screen.</li> </ol> </li> <li>f. Certify Schedule (top, 4<sup>th</sup> button from the left).               <ol style="list-style-type: none"> <li>1) SPS user Confirmation, OK.</li> <li>2) SPS Response message, Successful, OK.</li> </ol> </li> <li>g. Stamp the Pre-edit report with the Certify Stamp, date and sign (same signature on file with the Treasury) Select the next schedule to process, repeat step 3.</li> <li>h. After all Schedules are certified, View Extracted (top, 9<sup>th</sup> button from the left).</li> </ol> <p>The Privacy Act of 1974 states that not more than one piece of Personally Identifiable Information (PII) should occur together on a document.</p> <ol style="list-style-type: none"> <li>i. Print list (top, 2<sup>nd</sup> button from the left).               <ol style="list-style-type: none"> <li>1) change page 1 to <u>1</u>.</li> <li>2) change number of copies to include 1 for each schedule number and 1 for the SPS machine copy.</li> </ol> </li> </ol>	

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	<p>j. Log out (top, last button on the right).</p> <p>The Privacy Act of 1974 states that not more than one piece of Personally Identifiable Information (PII) should occur together on a document.</p> <p>k. Log out of PC.</p> <p><b>Output:</b> SPS payment transmitted</p>	
<p>Step 29</p> <p><b>NSSC Travel (SP)</b></p> <p>Forward Payment Proposals for Retention</p>	<p>a. Proposals are sent to Document Imaging for scanning.</p> <p>b. Documents are forwarded to Record Retention for offsite storage.</p> <p><b>Output:</b> Proposals forwarded for permanent storage.</p>	
<p>Step 30</p> <p><b>NSSC Travel (SP)</b></p> <p>Receive voucher reports and update spreadsheets</p>	<p>a. Once payment has been made, receive Vouchers with folders from Certifying Officer.</p> <p>b. Write schedule number from SAP in block 4 on each 1012</p> <p>c. Log payments, schedule number and date paid on Form 1575 in employee's folder.</p> <p>d. Scan documents to add to EFC file in Tech Doc, and to email out to the employee</p> <p>e. Each .pdf file is password protected with the last four of the employee's SSN, since the voucher has PII. It is emailed to the traveler.</p> <p>f. If no payments have been paid in this calendar year, retrieve appropriate RITA.xls or NO RITA.xls (first duty) 4782 master spreadsheet and save using</p>	

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	<p>employee's last name, first name and TA Number. If payments have been made, pull up the existing spreadsheet and update with current payment amounts.</p> <p>g. PCS Files are taken to Payroll (to log and upload taxes to DOI) after the vouchers have been emailed to the employee.</p> <p><b>Output:</b> Document payment of voucher.</p>	

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## METRICS

Initiating Office/Entity	Deliverable (Output)	Receiving Office/Entity	Metric
NSSC Financial Management / PCS	Approved En Route, Misc, Fixed Temporary Quarters, House Hunting Trip (Fixed and Actual) vouchers		Validate and process 85% of PCS vouchers within 6 business days of receipt of a complete voucher (including adequate funding).
NSSC Financial Management / PCS	Approved Actual Temporary Quarters, Real Estate and Constructive Vouchers		Validate and process 85% of PCS vouchers within 15 business days of receipt of a complete voucher (including adequate funding).
NSSC Financial Management / PCS	Approved RITA, ITRA, Storage of HHG, HMI, HHG and PPB&E		Validate and process 85% of PCS vouchers within 30 business days of receipt of a complete voucher (including adequate funding).

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**PRIVACY DATA**

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All participants involved must ensure protection of all data covered by the Privacy Act.

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## SYSTEM COMPONENTS

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### Existing Systems

IT System Title	IT System Description	Access Requirements	IT System Interfaces
<b>SAP Core Financial</b>	SAP Core Financial (SAP GUI for Windows desktop software), located at IFM Competency Center;	User Access	SAP GUI , P-Card, CMM
<b>SPS</b>	Secure Payment System	IG & SP User Role	N/A
<b>FPPS</b>	Web Federal Personnel/Payroll System	User Access	SATERN
<b>I-VIEW</b>	Portal to IEMP for access to IEM applications, reference materials, operations schedules, calendars, and web-based services / Also references OLQR help and process reference information	User Support and User Access	SAP, CMM

### New Systems

IT System Title	IT System Description	Access Requirements	IT System Interfaces
moveLINQs	Creating Estimates and Working vouchers for 2008 TA numbers forward	User Access	none

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## CUSTOMER CONTACT CENTER STRATEGY

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Each activity requires a clearly defined contact center strategy which answers the question "Who will answer the call and handle the request" and defines the escalation parameters for the activity. Because of the varied nature of the NSSC's activities and the volume of transactions, each activity has a unique contact center strategy. Refer to the NASA Shared Services Customer Contact Center Service Delivery Guide for the contact center strategy for this activity.

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## APPENDIX

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### Appendix A - Domestic Transfer Funding Estimate Instructions – Excel

Note: For 2008 and later TA numbers, moveLINQ is the primary tool for estimates; however, the Excel spreadsheet is retained and occasionally used to compute estimates for amendments to orders for 2007 and earlier. Also complete the Excel sheet for funds obligation assistance.

Retrieve appropriate cost estimating worksheet master file from FUNDING ESTIMATE MASTERS excel folder based upon the Center to which the employee is transferring (Receiving Center) and the type of transfer (First Duty, Transferee, or NASA Flex). As an example, for an employee transferring to Headquarters, the master file name would be HQ-10CP06FMASTER.xls if a First Duty assignment or HQ-10C06TMASTER if a transferee (permanent change of station, temporary change of station, or SES last move home). For NASA Flex, use the T master file as a base and save replacing the T with an N.

Save the master file in the FUNDING ESTIMATE ACTIVE WORKSHEETS excel folder using the following format:

AA-LASTNAME##CPBB-XXX where...

AA = Receiving Center

LASTNAME = last name of traveler

## = Receiving Center ID number

CP = always stays the same

BB = Program/Fiscal year

XXX = Sequence number assigned on travel authorization worksheet (can usually be found on NF1450, block 1a – last 3 digits).

In the “PCS 1<sup>st</sup> DUTY TRANSF FUNDING” tab, complete only the shaded areas of the worksheet:

**HEADING:**

Center = Receiving Center (NF 1450, block 6a)

Name = Traveler name, input as Last name, first name, middle initial (NF 1450, block 3)

TA# = Travel authorization number (NF 1450, block 1a)

SSN = only last 4 digits of SSN (NF 1449, block 8)

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Vendor = Employee vendor code SAP (should be manually documented in margin at top of NF 1450).

EOD = Enter on Duty Date (NF 1450, block 7)

From = Center from which employee is being transferred (NF 1450, block 5). If not transferring from a Center, input state from which employee is transferring.

To = Center to which employee is being transferred (NF 1450, block 6a)

Travel Dates = days employee will be traveling (NF 1450, block 9) – note that an “En Route” is a one way trip. Enter travel dates on appropriate line item for Permanent Change of Station (PCS) vs. Temporary Change of Station (TCS).

Input date prepared and SAP date (should be same as date repared) in cells L1 and M1.

#### Section 1: Entitlement for En Route

**Note: En Route entitlements are the same for PCS and TCS. Refer to FTR 302-3.412 and FTR 302-4.**

EMPLOYEE: (See NF 1450, block 12c for authorized travel mode)

**En Route Automobile Transportation Miles** = enter distance from Rand-McNally map +5% for cushion (FTR 302-4.201)

**En Route Per Diem Full rate** = enter Standard CONUS rate (FTR 302-4.200 thru .202). See Rate Summary Sheet tab. Only the employee receives full per diem for En Route.

SPOUSE/DEPENDENT (SPO/DEP): (See NF 1450, blocks 12a and b for authorization of family travel and travel mode.)

**Note: Family travel is addressed in FTR 302-4.100 and 302-4.203 thru .302.** See 302.4.100 and caption over 302.4.203—what is the difference between PCS and Transferred employees—isn't it the same?

**En Route Automobile Transportation Rate** = Check current mileage rate per FTR.

**En Route Automobile Transportation Miles** = same mileage as employee whether or not in the same car (FTR 302-4.204?)

**En Route Per Diem No. of People (applicable to Transferee only)** = Input as follows (TR 302-4.203 thru 302-4.206): Line 1 = Employee (or spouse if traveling separately at different time) who is reimbursed at 100% of per diem rate (FTR 302-4.203 thru .205)

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Line 2 = Number of family members age 12 or older who are reimbursed at 75% of per diem rate (FTR 302-4.206) This includes spouse if not traveling separately.

Line 3 = Number of children under 12 who are reimbursed at 50% of per diem rate (FTR 302-4.206)

**En Route transportation Airfare Rate** = Cost of one way air fare based on current rates obtained from CI Travel (1-800-287-9027) if approved on NF 1450, block 12a – c. Keep note in file documenting date CI Travel was called, name of person helping you and the fares that were quoted (usually noted in margin on 1450). If range of fares is quoted, use the highest quote for estimating purposes.

**No. of People** = Number of people for which airfare has been authorized (see NF 1450, block 12a-c)

## Section 2: Entitlement for House Hunting

**Note: House hunting trips (HHT) are authorized in NF 1450, block 13a. HHT expense entitlements are addressed in FTR 302-5.**

**Per Diem Rate – Actual Cost** = For employee, input per diem rate based on standard CONUS or locality rate based on Receiving Center on line 1 based on GSA rate schedule ([www.gsa.gov](http://www.gsa.gov)) For employee's spouse, input 75% of employee's per diem rate on line 2. See NF 1450, blocks 13a and 13b regarding who is authorized to travel on HHT.

**No. of Travel Days** = Authorized number of travel days per NF 1450, block 13c. (FTR 302-5.11)

**Per Diem Fixed Cost Locality Rate** = GSA rate for receiving locality ([www.gsa.gov](http://www.gsa.gov))

**Per Diem Fixed Cost Factor** = Input a **1** on line 1 if employee and spouse are traveling on HHT; or input a **1** on line 2 if employee is traveling alone.

**Mileage rate if Driving Rate** = use current GSA approved rate for mileage.

**Mileage if Driving Factor** = distance as determined in Rand McNally map. Pertains to actual or fixed cost.

**Airfare – Round Trip Fare Rate** = Cost of round trip air fare based on current rates obtained from CI Travel (1-800-287-9027). Keep note in file documenting date CI Travel was called, name of person helping you and the fares that were quoted (this is usually noted in margin on 1450). If range of fares is quoted, use the highest quote for estimating purposes.

**Airfare – No. of Persons Traveling Rate** = Number of persons authorized to travel per NF 1450, block 13b

**Rental Car Rate** = If authorized in NF 1450, block 13d, input standard average daily rental rate of \$40

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**Rental Car Factor** = Number of days authorized as indicated in NF 1450, block 13c.

### Section 3: Entitlement for Temporary Quarters

**Note: Temporary Quarters are authorized in NF 1450, block 15a. Temporary Quarters Subsistence Expense (TQSE) entitlements are addressed in FTR 302-6.**

**No. of Persons – Actual Cost 1<sup>st</sup> 30 Days** = On line 1, input **1** for employee or **2** for employee and spouse if spouse is traveling separately. On line 2, input the number of dependents age 12 and older that are authorized to travel, including spouse if he/she is traveling at the same time as employee and not included on line 1. On line 3, input the number of dependents under that age of 12 that are authorized to travel. (FTR 302-6.100 thru .102)

**No. of Persons – Actual Cost 2<sup>nd</sup> 30 Days** = On line 1, input **1** for employee or **2** for employee and spouse if spouse is traveling separately. On line 2, input the number of dependents age 12 and older that are authorized to travel, including spouse if he/she is traveling at the same time as employee and not included on line 1. On line 3, input the number of dependents under that age of 12 that are authorized to travel. (FTR 302-6.100 thru .102)

**Locale rate – Fixed Cost** = Rate for locality of Receiving Center as per GSA ([www.gsa.gov](http://www.gsa.gov)) (FTR 302-6.200 thru .203)

**No. of Persons – Fixed Cost** = On line 1, input **1** for employee; on line 2, input number of additional family members. (FTR 302-6.200 thru .203)

### Section 4: Real Estate Estimated Cost

**Note: Real Estate entitlements are authorized in NF 1450, block 16 and addressed in FTR 302-11. Relocation and property management services that may be authorized on NF 1450 are not included in the estimate.**

**Unexpired Lease – Actual Cost** = Input cost to break lease indicated on NF1449 Block 18m. (FTR 302-11.320-.321)

**Sale** = Proceeds from sale of old house...note that associated costs are computed as 10% of the sale value (NOT TO EXCEED \$21,340 PER FMM 9762-16F) for estimating purposes. Employee will file actual cost with voucher later. If traveler is part of the guaranteed home sale program, the rate is 18.25% of the sale price. Funds are set aside on the PR Contract, not on the FC document.

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**Purchase** = Amount paid for new house...note that associated costs are computed as 5% of the purchase price (NOT TO EXCEED \$10,669 PER FMM 9762-16F) of new home for estimating purposes. Employee will file actual cost with voucher later.

**Home Marketing Incentive** = No input required. HMI awards are paid to permanent change of station employees who's selling their home to Cartus, and brings a bona fide buyer to the table within 60 days. An award fee is calculated by a third party and processed by the voucher technician.

#### Section 5: **Miscellaneous Cost**

**Note: Miscellaneous entitlements are authorized in NF 1450, block 11 and addressed in FTR 302-16.**

**No. of Persons** = input the number **1** in the appropriate box: for a single individual the standard reimbursement is \$500; for employee with family the standard reimbursement is \$1,000 in total (not \$1,000 per person in the family)

#### Section 6: **Household Goods (Commercial Bill of Lading (CBL))**

**Note: Household goods entitlements are authorized in NF 1450, block 14 and addressed in FTR 302-7 and 302-8**

**Cost (HHG CBL)** = Input the amount from the pre-move survey provided by TPC. Funds are set aside on PR Contract, not on FC document.

#### Section 7: **Shipment of POV**

**Note: Shipment of POV is authorized in NF 1450, block 14 g and addressed in FTR 302-9**

**Rate** = from cost comparison worksheet with travel orders, sum of airfare cost plus productivity cost. Funds are set aside on PR Contract, not on FC Document

**No. of Vehicles** = number of vehicles authorized for shipment. There will be a cost comparison for each vehicle if more than one.

Note: If shipment of POV is authorized, remove mileage from En Route calculation and input one way airfare and number of people authorized to fly.

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## Appendix B - House Hunting Trip (fixed)

*Refer to FTR 302-5 for regulations governing reimbursement for House hunting trips.*

1. Receive HHT voucher (Standard Form 1012 and 1012a) and supporting receipts for expenses other than lodging and meals.
2. If POV is used to make HHT and map hasn't been printed, print map. Map travel distance should be from residence to Receiving Center. Check the employee's mileage against the map. Employee should be allowed the mileage indicated on SF 1012 regardless of the map as long it is within 5% of mileage indicated by map. If employee distance is greater than 5% then revert to the distance on the map (not including the 5% extra).
3. If air transportation is used, ensure that airfare receipt/itinerary has been included.
4. If applicable, receipts for rental car (regardless of amount), and other receipts for expenses >\$75 (rental car gas, parking tolls, cabs, etc.) are attached and agree to information
5. Compare HHT voucher to travel orders to make sure employee is filing expenses for appropriate entitlements. Things to look for include:
6. Ensure that expense reimbursement requested agrees to authorized entitlements on NF1450.
  - a. Ensure that HHT date is after signature date on Service Agreement (filed with travel orders) but before the EOD date.
  - b. Observe marital status. Consider whether or not expenses claimed should include spouse. No reimbursement is provided for other dependents that participate in the HHT.
  - c. If POV is used, determine that mileage rate is correct based on number of people traveling and is properly recorded on SF1012. Note that vicinity mileage is not available if using a rental car (but gas would be allowed).
  - d. Correct per diem locality rate is used (should be for the Receiving Center). For fixed rate reimbursement, receipts for lodging and meals are not required since employee is being reimbursed based on locality rate. Note that for fixed HHT, if the employee travels alone, or if the spouse travels alone, they are paid the locality rate times a multiplier of 5. If they travel together, they are paid the locality rate times a multiplier of 6.25 (FTR §302-5.13).
  - e. Receipts for airline (airline itinerary), rental car, rental car gas, parking tolls, cabs, etc are attached and agree to information documented on SF1012a.

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- f. If employee digresses from travel orders, reimbursement is limited to what is authorized in the orders. For example, if employee is authorized to drive but decides to fly and submits airfare expenses calculate reimbursement both ways and pay the lesser of the two.
- g. If airfare is claimed, contact CI Travel to determine what method was used to pay for airline tickets. If paid by CBA (i.e., NASA pays directly), don't reimburse employee for airfare, but claim as 3rd Party reimbursement in worksheets in space provided.
- h. Expenses are properly totaled.
7. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls and save as "Last Name, First Name Center Abbr and Entitlement Type.
8. In calculation worksheet, complete Information Sheet tab and update the appropriate Fixed HHT entitlement tabs (FIXEDHHT, FIXEDHHTTXS, RECAPPFIXHHT) using information from SF1012a.
9. Print a copy of the Information sheet and the worksheets above.
10. If 2008 or later TA number, use moveLINQ to process voucher.
11. Confirm that funding is present for the entitlement using SAP (FMZ3 Funds Commitment Display Overview) for general ledger account 6100.2123. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS.
12. Complete Form FB60 (form is self explanatory) and finalize Voucher Review Checklist.
13. Transfer tax information from PCS Worksheet for Travel Accounting (from ...TXS worksheet above) to bottom of SF 1012 block 13 (Amount Claimed) and block 17. Also, document amount paid on Voucher Review Checklist
14. Compile voucher package. Packet should include (in order - only when going to the auditor) the following:
  15. -Voucher Review Checklist
  16. -Permanent Change of Station (Information) Worksheet
  17. -Current FPPS Info
  18. -Form FB60
  19. -SAP Funds Commitment Information
  20. -Forms 1012 and 1012a and supporting documentation, if any
  21. -PCS Relocation Payment Worksheet (payment breakdown)
  22. -PCS Worksheet for Travel Accounting (tax data)
  23. -PCS Per diem worksheet for HHT
24. 14. Forward (along with Remedy ticket) to FM-CS for audit of voucher. Make appropriate corrections if necessary as requested by Auditor and return to Auditor to review and approve.

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- 25. When returned and approved from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
- 26. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix C - House Hunting Trip (actual)

*Refer to FTR 302-5 for regulations governing reimbursement for House hunting trips.*

1. Receive HHT voucher (*Standard Form 1012 and 1012a*) and supporting receipts.
2. If POV is used to make the HHT and map hasn't been printed, print map. Map travel distance should be from residence to Receiving Center. Check the employee's mileage against the map. Employee should be allowed the mileage indicated on SF 1012 regardless of the map as long it is within 5% of mileage indicated by map. If employee distance is greater than 5% then revert to the distance on the map (not including the 5% extra).
3. Compare HHT voucher to travel orders to make sure employee is filing expenses for appropriate entitlements. Things to look for include:
  - a. Ensure that expense reimbursement requested agrees to authorized entitlements on NF1450.
  - b. Ensure that HHT date is after signature date on Service Agreement (filed with travel orders) but before EOD date.
  - c. Observe marital status. Consider whether or not expenses claimed should include spouse. No reimbursement is provided for other dependents that participate in the HHT.
  - d. If POV is used, determine that mileage rate (including vicinity mileage if applicable) is correct based on number of people traveling and is properly recorded on SF1012. Note that vicinity mileage is not available if using a rental car (but gas would be allowed).
  - e. Hotel/lodging receipts are attached and properly recorded and that dates concur with date of trip. Also ensure that the number of days being claimed agrees to the number of days authorized. Note that a 10 day authorized HHT is equivalent to 9 nights of lodging.
  - f. If applicable, receipts for airline, rental car (regardless of amount), and other receipts for expenses >\$75 (rental car gas, parking tolls, cabs, etc.) are attached and agree to information documented on NF1012a.
  - g. If employee digresses from travel orders, reimbursement is limited to what is authorized in the orders. For example, if employee is authorized to drive but decides to fly and submits airfare expenses, calculate reimbursement both ways and pay the lesser of the two.
  - h. If airfare is claimed, contact CI Travel to determine what method was used to pay for airline tickets. If paid by CBA (i.e., NASA pays directly), don't reimburse employee for airfare, but claim as 3<sup>rd</sup> Party reimbursement in worksheets in space provided.
  - i. Expenses are properly totaled.

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4. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls and save as "Last Name, First Name Center Abbr and Entitlement Type In calculation worksheet, complete Information Sheet tab and update the appropriate Actual HHT entitlement tabs (HHUNT, HHTTAX, RECAPHHT) using information from SF1012a. Print a copy of the Information sheet and the worksheets above.
5. If 2008 or later TA number, use moveLINQ to process voucher.
6. Confirm that funding is present for the entitlement using SAP (*FMZ3 Funds Commitment Display Overview*) for general ledger account 6100.2123. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from Funding Station using standard memo.
7. Complete Form FB60 (form is self explanatory) and finalize Voucher Review Checklist.
8. Transfer tax information from PCS Worksheet for Travel Accounting (from ...TAX worksheet above) to bottom of SF 1012 block 13 (Amount Claimed) and block 17. Also, document amount paid on Voucher Review Checklist.
9. Compile voucher package. Packet should include (in order – only when going to the auditor) the following:
  - a. -Voucher Review Checklist
  - b. -Permanent Change of Station (Information) Worksheet
  - c. -Current FPPS info
  - d. -Form FB60
  - e. -SAP Funds Commitment Information
  - f. -Forms 1012 and 1012a and supporting documentation
  - g. -PCS Relocation Payment Worksheet (payment breakdown)
  - h. -PCS Worksheet for Travel Accounting (tax data)
10. Forward (with Remedy ticket) to FM-CS for audit. Make appropriate corrections if necessary as requested by Auditor and return to auditor to approve and sign.
11. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
12. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix D - En Route

*Refer to FTR 302-3.412 and FTR 302-4 for regulations governing reimbursement for En Route*

1. Receive **signed** En Route voucher (*Standard Form 1012 and 1012a*).
2. If map hasn't been printed, print map. Map travel distance should be from residence to residence if at all possible. If not, use Center information. Check the employee's mileage against the map. Employee should be allowed the mileage indicated on SF 1012 regardless of the map as long it is within 5% of mileage indicated by map. If employee distance is greater than 5% then revert to the distance on the map (not including the 5% extra).
3. Compare En Route voucher to travel orders to make sure employee is filing expenses for appropriate entitlements. Things to look for include:
  - a. Double check the service agreement to determine if this is a First Duty versus Transfer since reimbursement rules differ.
  - b. Ensure that expense reimbursement requested agrees to authorized entitlements on NF1450.
  - c. Ensure that En Route date is after signature date on Service Agreement (filed with travel orders).
  - d. Observe marital status and number of dependents. Consider if entitlements are consistent with reimbursement rules.
  - e. If spouse and dependents are included, observe if travel is on same or different days to ensure reimbursement is properly calculated.
  - f. Determine that mileage rate is correct based on number of people traveling and is properly recorded on SF1012. Mileage may be rounded to nearest increment of 5. Odometer reading is not required as long as employee has indicated mileage. If there is no mileage recorded, use mileage on Rand McNally map to calculate reimbursement distance.
  - g. If voucher is for a one day En Route (<12 hours), the traveler must record travel times. It may be necessary to call the employee to get the travel times. A meal per diem is not paid for trips less than 12 hours but lodging is available if it is split over 2 days. Traveler is reimbursed at 75% of M&EI rate on the day of departure and the day of arrival. Days in between are reimbursed at 100%. Lodging and meals are reimbursed based on Standard CONUS rates.
  - h. If employee digresses from travel orders, reimbursement is limited to what is authorized in the orders. For example, if employee is authorized to drive but decides to fly and submits airfare expenses calculate reimbursement both ways and pay the lesser of the two.
  - i. If airfare is claimed, contact CI Travel to determine what method was used to pay for airline tickets. If paid by CBA (i.e., NASA pays directly), don't

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reimburse employee for airfare, but claim as 3<sup>rd</sup> Party reimbursement in worksheets in correct space provided.

- j. If lodging is claimed, review receipts for disallowed items such as pet fees, movie rentals, alcohol, etc.
4. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls or 2006Worksheet-First duty.xls and save as "Last Name, First Name Center Abbr and Entitlement Type.
5. If 2008 or later TA number, use moveLINQ to process voucher.
6. In calculation worksheet, complete Information Sheet tab and update the appropriate En Route entitlement tabs using information from SF1012a. Print a copy of the Information sheet and the En Route worksheets.
7. Confirm that funding is present for the entitlement using SAP (*FMZ3 Funds Commitment Display Overview*) for general ledger account 6100.2123. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS using standard memo.
8. Complete Form FB60 (form is self explanatory) and finalize Voucher Review Checklist.
9. Transfer tax information from PCS Worksheet for Travel Accounting (from ...TXS worksheet above) to bottom of SF 1012 block 13 (Amount Claimed) and block 17. Also, document amount paid on Voucher Review Checklist.
10. Compile voucher package. Packet should include (in order) the following:
  - a. -Voucher Review Checklist
  - b. -PCS Per Diem Information (recap)
  - c. -Current FPPS Info
  - d. -Form FB60
  - e. -SAP Funds Commitment Information
  - f. -Forms 1012 and 1012a and supporting documentation, if any
  - g. -PCS Relocation Payment Worksheet (payment breakdown)
  - h. -PCS Worksheet for Travel Accounting (tax data)
  - i. -Permanent Change of Station (Information) Worksheet
11. Forward (with Remedy ticket) to FM-CS for audit. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
12. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
13. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix E – Miscellaneous Expense Allowance (MEA)

*Refer to FTR 302-16 for regulations governing reimbursement for miscellaneous expenses*

1. Receive miscellaneous expense voucher (Standard Form 1012 front only).
2. Compare miscellaneous voucher (SF1012) to travel orders (NF1450 block 11) to make sure employee is filing expenses for appropriate entitlements. For a single individual, the standard reimbursement is \$500; for employee with family the standard reimbursement is \$1,000 in total (not \$1,000 per person in the family). A request for actual reimbursement is allowed. See regulations for guidelines.
3. If a 2007 or older TA number: Pull up 2007 Worksheet-transferee.xls and save as "Last Name, First Name Center Abbreviation and Entitlement Type
4. If 2008 or later TA number, use moveLINQ to process voucher.
5. In calculation worksheet, complete Information Sheet tab and update the Miscellaneous entitlement tabs (MISCTXS, RECAPMISC) using information from SF1012. Print a copy of the Information sheet and the entitlement tabs.
6. Confirm that funding is present for the entitlement using SAP (FMZ3 Funds Commitment Display Overview) for general ledger account 6100.1281. Print a copy. If adequate funding is not present, request additional funding from FM-CS.
7. Complete Form FB60 (form is self explanatory-see example) and finalize Voucher Review Checklist.
8. Transfer tax information from PCS Worksheet for Travel Accounting (from ...TXS worksheet above) to bottom of SF 1012 block 13 (Amount Claimed) and block 17. Also, document amount paid on Voucher Review Checklist.
  - a. Compile voucher package. Packet should include (in order – only when going to auditor) the following:
    - b. -Voucher Review Checklist
    - c. -Permanent Change of Station (Information) Worksheet
    - d. -Current FPPS printouts
    - e. -Form FB60
    - f. -SAP Funds Commitment Information
    - g. -Form 1012
    - h. -PCS Relocation Payment Worksheet (payment breakdown)
    - i. -PCS Worksheet for Travel Accounting (tax data)
    - j. Still waiting on spouse, note so.
9. Forward (with Remedy ticket) to FM-CS for audit. Make appropriate corrections if necessary as requested by auditor and return to auditor to review and approve.
10. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
11. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix F - Temporary Quarters (fixed)

*Refer to FTR 302-6 for regulations governing reimbursement for Temp Qtrs*

**(Note:** For supplemental travel expense vouchers, retrieve original file, save under new name, input any changes in bold. Add line to “Form” tab to show previous payments so that net payment to employee is for supplemental expenses only.)

1. Receive **signed** TQ Voucher Standard Form 1012 1012a.
2. Complete information portion of the Voucher Review Checklist.
3. Verify that the En Route has been processed prior to TQ voucher. If not, then locate the En Route to ensure it is pending processing or put TQ voucher in pending box to wait for En Route processing.
4. Review TQ voucher along with supporting documentation from employee.
  - a. Ensure the TA# is documented on the SF1012.
  - b. Verify signatures are completed on the SF 1012. Form needs to be returned for correction if signature is not present.
  - c. Verify proper locality rate is used to calculate fixed rate.
  - d. Reference the NASA Form 1450 marital status. If there are dependents, determine whether/not previous payments have been made for dependents.
  - e. Fixed TQ payments are limited to **30** days.
5. If a 2007 or older TA number Pull up 2006Worksheet-transferee.xls and save as “Last Name, First Name Center Abbr and Entitlement Type. Complete the Permanent Change of Station PCS Worksheet (INFORMATION)
6. If 2008 or later TA number, use moveLINQ to process voucher.
7. Update the Temporary Quarters Fixed Rate (FIXEDTQSE)
  - a. Locality Rate (Reference the “PCS Travel Consolidated Info” sheet for rate of the receiving center. The rate is based on the EOD time frame.)
  - b. No. of Employee
  - c. No. of Accompanying family members
8. Print the following worksheets:
  - a. Permanent Change of Station PCS Worksheet (INFORMATION)
  - b. Temporary Quarters Fixed Rate sheet (FIXEDTQSE)
  - c. PCS Worksheet for Travel Accounting (FIXTQSETXS)
  - d. PCS Relocation Payment Worksheet. (RECAPFIXTQSE)
9. Update the SF1012 with the Tax information from the PCS Worksheet for Travel Accounting. (Box bottom left “PCS Worksheet for Travel Accounting”)

<u>PCS Wksht for Travel Acct:</u>		<u>SF 1012:</u>	
Gross Claim	=	Block 13 Amount Claimed \$	
All types with \$	=	Block 17a Write type of tax and +/- \$	
Net Payment	=	Block 17b Total verified Correct...\$	

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- Less Advance                      =                      Block 17c Applied to travel Advance -\$  
 Net to Employee =                      Block 17d Net to Traveler
10. Confirm that funding is present for the entitlement using SAP for general ledger account 6100.1261. (See instructions for Confirm Funding) Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS.
  11. Complete Form FB60 (form is self explanatory) and finalize Voucher Review Checklist.
  12. Compile voucher package. Packet should include (in order – only when going to the auditor) the following:
    - a. -Voucher Review Checklist
    - b. -Permanent Change of Station Worksheet (information)
    - c. -Form FB60
    - d. -Current FPPS printouts
    - e. -Copy of funds commitment information from SAP
    - f. -SF1012
    - g. -PCS Relocation Payment Worksheet (payment breakdown)
    - h. -PCS Worksheet for Travel Accounting (tax data)
    - i. -FTQ Calculation Worksheet
  13. Forward (with Remedy ticket) to FM-CS for review. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
  14. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
  15. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix G - Temporary Quarters (actual)

*Refer to FTR 302-6 for regulations governing reimbursement for Temp Qtrs*

**(Note:** For supplemental travel expense vouchers, retrieve original file, save under new name, input any changes in bold. Add line to “Form” tab to show previous payments so that net payment to employee is for supplemental expenses only.)

1. Receive TQ Voucher **signed** Standard Form 1012, and **signed** NASA Form 1500.
2. Complete information portion of the Voucher Review Checklist.
3. Review TQ voucher (*Standard Form 1012 and NF1500*) along with supporting documentation from employee.
  - a. Ensure the TA# is documented on the SF1012.
  - b. Verify signatures are completed on the SF 1012 and NF1500. Forms need to be returned for correction if signature is not present.
  - c. Note marital status. If there are dependents, determine whether/not previous payments have been made for dependents.
  - d. Expenses filed are compliant with those authorized on NF1450 (blocks 15 a - c) and agree with the SF1012, SF1012a and Form 1500.
  - e. If actual House hunting trip was authorized, the number of HHT authorized days is deducted from the TQ first 30 days.
  - f. Sample: 60 days of TQ, member took 10 days of House Hunting
  - g. 10 days of AHT + 20 days of TQ = 30day 1<sup>st</sup> TQ Full Rate (HH paid on pervious voucher)
  - h. 30days of TQ = 2<sup>nd</sup> TQ Reduced Rate
  - i. If Fixed House hunting trip was authorized, a standard 5 days is deducted from the first 30 days of TQ
  - j. Sample: 5 days of FHT + 25 days of TQ = 30 day 1<sup>st</sup> TQ Full Rate (FHT paid on previous voucher)
  - k. 30days of TQ = 2<sup>nd</sup> TQ Reduced Rate
  - l. TQ dates must be continuous unless interrupted by Sick, TDY, or En Route.
  - m. TQ stops the day before Permanent Quarters date (as documented on first page of NF1500).
  - n. Base payments are made for **30** days unless extension is authorized in block 15c of NF1450.
  - o. If voucher is for extension, check propriety of the date sequence compared to previous vouchers and overall number of approved days. Check TQ days being requested for reimbursement.
  - p. Review receipts for anything unusual. Pay special attention to “other” expenses to determine if they are justifiable, like dry cleaning. No – pet,

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alcohol, or tobacco charges, etc. are allowed (see regulations). For expenses such as utilities, cable, water, etc, a copy of **all** pages of the bill are required.

- q. Verify any rate changes on lodging receipts. Verify charges by each day. Sort by 1<sup>st</sup> TQ dates and 2<sup>nd</sup> TQ dates.
  - r. Sort receipts for lodging, meals, laundry, utilities and others receipts per the 1<sup>st</sup> TQ dates and 2<sup>nd</sup> TQ dates determined. All receipts greater than \$75 are required.
  - s. All Grocery receipts are required. Only food and laundry detergent are allowed.
  - t. Expenses are properly summarized and totaled prior to starting worksheets.
4. If a 2007 or older TA number Pull up 2006Worksheet-transferee.xls and save as "Last Name, First Name Center Abbr and Entitlement Type.
  5. If 2008 or later TA number, use moveLINQ to process voucher.
  6. Complete the Permanent Change of Station PCS Worksheet (INFORMATION)
 

Start Date: 1<sup>st</sup> TQ – start date of HHT if taken  
                   2<sup>nd</sup> TQ – Start date is the start of the 2<sup>nd</sup> TQ date

End Date: 1<sup>st</sup> TQ and 2<sup>nd</sup> TQ end of TQ or date of Permanent Qtr.

Travelers Name: XXXXX  
 Authorization Number: XXXX sample 10CP05T357  
 Number of Dependents: #  
 Type of Retirement: FERS or CSRS  
 Input State abbreviation, and tax rate is automatically updated  
 For FERS employees: From the "levw" screen in FPPS, put current pay period OASDI and YTD OASDI to check for max FICA. If over annual limit, put X in CSRS box, as not to withhold any more FICA tax.  
 Per Diem Rate: Max Per Day rate (wait to complete this after updating 2005 or 2006 MEALS worksheet as per instructions below)  
 SSN  
 EOD  
 Traveler Center (Use drop down box)
  7. Update the 2005 or 2006 MEALS worksheet depending upon appropriate fiscal year. Be careful to use the correction section of the worksheet depending on whether/not this is a 1<sup>st</sup> TQ or subsequent TQ's. Print a copy of this sheet.
  8. Once 2005 or 2006 MEALS worksheet is completed, using information from this worksheet, return to the information sheet and input the "maximum per day rate" and the "maximum per 30 days" rate. **If TQ voucher is for other than 30 days, adjust the text and the formula of the "maximum per 30 days" input line.**
  9. Update the Temporary Quarters Actual expense worksheets as applicable (lodging, electricity, telephone, and cable).

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*Helpful Hint:* use blank sheets in this Xcel file to document any calculations you prepare yourself such as tabulating lodging expenses, groceries, etc.

10. Update "Form" worksheet – Daily Itemization of Expenses Paid:
  - a. Adjust dates in Column B as required to accommodate HHT and the specific days of TQ claimed on this voucher.
  - b. Check to ensure that lodging, electricity, etc flowed through properly in column N.
  - c. Input meals and other using information on NF1500. Make sure totals in columns Q through U balance to NF1500.
  - d. Update Maximum Allowed Text (cell C43), Actual M&IE (cell C44 using information generated on 2005 or 2006 MEALS worksheet) and Maximum M&IE (cell 043) which is equal to the sum of meals and other claimed in columns Q through U plus total lodging in column N.
11. Print the following worksheets:
  - a. -Permanent Change of Station PCS worksheet (INFORMATION)
  - b. -Applicable Temporary Quarters worksheets (lodging, electricity, etc)
  - c. -PCS Worksheet for Travel Accounting (TEMPTXS)
  - d. -PCS Relocation Payment worksheet. (RECAPTEMP)
12. Update the SF1012 with the Tax information from the PCS Worksheet for Travel Accounting.
 

<u>PCS Travel Accting Wrksht:</u>		<u>SF 1012:</u>
Gross Claim	=	Block 13 Amount Claimed \$
All types with \$	=	Block 17a Write type of tax and +/--\$
Net Payment	=	Block 17b Total verified
Correct...\$		
Less Advance	=	Block 17c Applied to travel
Advance -\$		
Net to Employee	=	Block 17d Net to Traveler
13. Confirm that funding is present for the entitlement using SAP for general ledger account 6100.1261. (See instructions for Confirm Funding) Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS.
14. Complete Form FB60 (form is self explanatory) and finalize Voucher Review Checklist.
15. Compile voucher package. Packet should include (in order – only when going to the auditor) the following:
  - a. -Voucher Review Checklist
  - b. -Permanent Change of Station Worksheet (information sheet)
  - c. -Current FPPS printouts
  - d. -Form FB60
  - e. -Copy of funds commitment information from SAP

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- f. -SF1012
  - g. -NF 1500
  - h. -PCS Relocation Payment Worksheet (payment breakdown)
  - i. -PCS Worksheet for Travel Accounting (tax data)
  - j. -Other Temporary Quarters worksheets (lodging, electricity, etc)
16. Forward (with Remedy ticket) to FM-CS for review. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
17. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
18. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix H - Home Marketing Incentive

1. NSSC will receive the HMI memo from Outside Vendor. When memo comes, forward to web requestor to approve for payment.
2. Document Management will receive and date stamp official HMI award sheet from Center indicating dollar amount of award and authorizing signature of Receiving Center's Director of Human Resources.
3. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls and save as "Last Name, First Name Center Abbr and Entitlement Type.
4. If 2008 or later TA number, use moveLINQ to process voucher.
5. In calculation worksheet, complete Information Sheet tab and update the HMI entitlement tabs (HMI (line D9) and RECAPHMI) using information from the HMI memo. Print a copy of the Information sheet and the entitlement tabs.
6. Request funding (HMI's are not included in the initial cost estimate). Once funding is committed, verify in SAP (FMZ3 Funds Commitment Display Overview) for general ledger account 6100.1281. Print a copy.
7. Update COS Checklist.
8. Complete Form FB60 (form is self explanatory).
9. Compile voucher package and forward to Auditor:
  - a. -Voucher Review Checklist
  - b. -Permanent Change of Station (Information) Worksheet
  - c. -Current FPPS info
  - d. -Form FB60
  - e. -HMI award letter with authorizing signature
  - f. -PCS Relocation Payment Worksheet
  - g. -PCS Worksheet for Travel Accounting
10. Forward (with Remedy ticket) to FM-CS for review. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
11. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
12. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix I - House Hold Goods

*Refer to FTR 302-7 and FTR 302-8 for regulations governing reimbursement for Household goods*

1. Receive HHG voucher (*Standard Form 1012 and 1012a*) from employee.
2. Compare HHG voucher to travel orders to make sure employee is filing expenses for appropriate entitlements. Things to look for include:
  - a. Ensure that expense reimbursement requested agrees to the authorized entitlements on NF1450.
  - b. Ensure that HHG shipment date is after signature date on Service Agreement (filed with travel orders).
  - c. If moved by government, review commercial bill of lading and compare to expenses claimed on SF1012.
  - d. If self move, ensure that receipts are presented for all expenses claimed (>\$75) and that dates and details of receipts comply with the authorizations on NF 1450. Expenses not allowed include a tow bar, extra insurance and meals and lodging (meals and lodging would be reimbursed on an En Route voucher.)
  - e. Expenses for professional books should be included in non-taxable household goods. Employee must submit a paid receipt for the shipment of professional books. Weight limit is 5 pounds.
  - f. Re-compute total expenses to check accuracy.
3. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls or 2006Worksheet-First duty.xls and save as "Last Name, First Name Center Abbr and Entitlement Type.
4. Note that this worksheet is not completed for a commercial bill of lading type of reimbursement.
4. In calculation worksheet, complete Information Sheet tab and update the appropriate HHG entitlement tabs (HHG and HHGRecap). Print a copy of the Information sheet and the worksheets.
5. Confirm that funding is present for the entitlement using SAP (*FMZ3 Funds Commitment Display Overview*) for general ledger account 6100.2214. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS using standard memo.
6. Complete Form FB60 (form is self explanatory) and finalize Voucher Review Checklist.
7. Transfer tax information from PCS Worksheet for Travel Accounting (from ...TXS worksheet above) to bottom of SF 1012 block 13 (Amount Claimed) and block 17. Also, document amount paid on Voucher Review Checklist.

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8. Compile voucher package. Packet should include (in order – only when going to auditor) the following:
  - a. -Voucher Review Checklist
  - b. -Permanent Change of Station (Information) Worksheet
  - c. -Current FPPS Info
  - d. -Form FB60
  - e. -SAP Funds Commitment Information
  - f. -Forms 1012 and 1012a and supporting documentation, if any
  - g. -PCS Relocation Payment Worksheet (payment breakdown)
  - h. -PCS Worksheet for Travel Accounting (tax data)
9. Forward (with Remedy ticket) to FM-CS for review. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
10. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
11. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix J - Lease Break

*Refer to FTR 302-11.320 and 11.321 for regulations governing reimbursement for Lease Breaks*

1. Receive lease break voucher (*Standard Form 1012 front only*) along with supporting documentation, including a signed copy of the lease showing the lease break penalties.
2. Complete the Unexpired Lease checklist.
3. Review the lease for the following:
  - a. Agreement should be in name of employee and whoever else is named in the original NF1450. Only employee and immediate dependents should be staying at the location. If a roommate is present that is not an immediate dependent, reimbursement is limited to 50% of expenses.
  - b. Compare date contract entered into and lease terms to Enter on Duty date to ensure that employee was staying at this leased location before EOD.
  - c. Rent reimbursement should be for month that includes the EOD date (unless the EOD is later in the month and employee stayed at the residence the majority of the month) through the expiration date of the lease if employee is required to pay. Forfeited deposits, lease break fees may be included in the reimbursement.
4. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls and save as "Last Name, First Name Center Abbr and Entitlement Type.
5. In calculation worksheet, complete Information Sheet tab and update the appropriate Lease Break entitlement tabs (LEASEBRK, LEASEBRKRECAP).
6. Print a copy of the Information sheet and entitlement worksheets.
7. Transfer tax information to SF1012. Mark SF1012 block 14 for signature of Approving Official.
8. Confirm that funding is present for the entitlement using SAP (*FMZ3-Funds Commitment Display Overview*) for general ledger account 6100.1271. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS using standard memo.
9. Complete Form FB60 (form is self explanatory).
10. Finalize and initial Voucher Review Checklist.
11. Compile voucher package. Packet should include (in order – only when going to auditor) the following:
  - a. -Voucher Review Checklist
  - b. -Permanent Change of Station (Information) Worksheet
  - c. -Current FPPS Info
  - d. -Form FB60
  - e. -Copy of funds commitment information from SAP

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- f. -Voucher (SF1012)
  - g. -PCS Relocation Payment Worksheet (payment breakdown)
  - h. -PCS Worksheet for Travel Accounting (tax data)
  - i. -Copies of emails sent or received regarding this transaction
  - j. -Any receipts/emails
  - k. -Lease Agreement
  - l. -Miscellaneous information
  - m. -Lease Break Checklist
12. Forward (with Remedy ticket) to FM-CS for review. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
  13. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
  14. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix K - Property Management

Refer to FTR 302-11.320 and 11.321 for regulations governing reimbursement for Lease Breaks

1. Receive property management fee voucher (*Standard Form 1012 front only*) along with supporting documentation. For first time reimbursement a signed copy of the property management agreement will be required.
2. Complete the Property Management checklist.
3. Review the lease for the following:
  - a. Agreement should be in name of employee and whoever else is named in the original NF1450. Only employee and immediate dependents should be staying at the location. If a roommate is present that is not an immediate dependent, reimbursement is limited to 50% of expenses.
  - b. Compare date contract entered into and property management agreement terms to Enter on Duty date to ensure that employee was staying at this leased location before EOD.
  - c. Paid receipts must be submitted for all fees reimbursed.
4. If a 2007 or older TA number: Pull up 2006Worksheet-transferee.xls and save as "Last Name, First Name Center Abbr and Entitlement Type. If 2008 or later TA, use moveLINQ to process voucher
5. In calculation worksheet, complete Information Sheet tab and update the appropriate Lease Break entitlement tabs (LEASEBRK, LEASEBRKRECAP). The Lease Break worksheets are used to compute Property Management Fee Reimbursements.
6. Print a copy of the Information sheet and entitlement worksheets.
7. Transfer tax information to SF1012. Mark SF1012 block 4 for signature of Approving Official.
8. Confirm that funding is present for the entitlement using SAP (*FMZ3-Funds Commitment Display Overview*) for general ledger account 6100.1271. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS using standard memo.
9. Complete Form FB60 (form is self explanatory).
10. Finalize and initial Voucher Review Checklist.
11. Compile voucher package. Packet should include (in order – only when going to auditor) the following:
  - a. -Voucher Review Checklist
  - b. -Permanent Change of Station (Information) Worksheet
  - c. -Current FPPS Info
  - d. -Form FB60

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- e. -Copy of funds commitment information from SAP
  - f. -Voucher (SF1012)
  - g. -PCS Relocation Payment Worksheet (payment breakdown)
  - h. -PCS Worksheet for Travel Accounting (tax data)
  - i. -Copies of emails sent or received regarding this transaction
  - j. -Any receipts/emails
  - k. -Property Management Fee agreement if first submittal
  - l. -Miscellaneous information
  - m. -Property Management Checklist
12. Forward (with Remedy ticket) to FM-CS for review. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
13. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
14. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal

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## Appendix L - Real Estate

*Refer to FTR 302-11 for regulations governing reimbursement for Real Estate*

1. Receive real estate voucher (*Standard Form 1012 front only and NASA Form 1338 front and back*) along with supporting documentation (signed HUD l/settlement statement and signed purchase/sale agreement)
2. Complete the Purchase/Sale of a Residence checklist.
3. Review residential purchase/sale agreement for the following:
  - a. Agreement should be in name of employee and whomever else is named in the original NF1450 and signed by all parties.
  - b. Compare date contract entered into to Service Agreement date (should be with original travel orders). The date of the contract must be later than the Service Agreement date.
  - c. Review sale/purchase price to be sure it matches price on settlement statement; review terms re inspections, seller paid closing costs, title insurance payer, and survey requirements.
4. Complete Real Estate Summary Notes/Comments.
  - a. Use map in file or print a copy of map supporting “reasonable driving distance” (must be over 50miles).
  - b. Check date original 1450 was signed to determine if reimbursement is subject to a maximum.
5. Review Settlement Agreement (HUD statement) for the following:
  - a. Name and property description should agree to Sale/Purchase Agreement and travel orders.
  - b. Check date of closing (must be after date of Service Agreement).
  - c. Check line by line for reimbursable expenses using Real Estate Reference Chart to determine if expenses are allowable. Expenses in the HUD statement 900 and 1000 blocks are not reimbursable. Mark allowable vs. non allowable.
6. Reconcile expenses claimed on NF1338 to the signed HUD statement to ensure that proper expenses are claimed. Also, look for items that could have been claimed by the employee but were not. These should be added to the employee’s reimbursement. Sometimes an employee will submit NF1338 without calculating allowable expenses in which case NSSC PCS Travel Dept may calculate reimbursable expenses.
7. If an expense claimed by the employee is non-reimbursable, research Controller General Decisions (CG Decisions) to document evidence that it is not reimbursable ([www.gsbca.gsa.gov](http://www.gsbca.gsa.gov) – *General Service Board of Contracts – Decisions – Search*). Print a copy of the applicable CG Decision to send to employee as support for the decision not to reimburse an amount.

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8. Assign correspondence sequence number (*2006LTRLOG.xls*)
9. Prepare standard letter to employee (*1PURSAMPLEtr.doc*, *1SALEsampleLTR.doc* or *1LETTERpur&sale.doc*). To recalculate totals in WORD document, highlight the total cell, select Table, Format, OK. Reconcile total claimed to NF1338; total allowed on standard letter and total on the HUD statement. Print one copy. Attach copies of CG Decisions.
10. If a 2007 or older TA number: Pull up "Current Year" Worksheet-transferee.xls and save as "Last Name, First Name TA number and Entitlement Type". If 2008 or later TA number, use moveLINQ to process voucher (see moveLinq instructions in Appendix N).
11. In calculation worksheet, complete Information Sheet tab and update the appropriate Real Estate entitlement tabs for purchase or sale.
12. Print a copy of the Information sheet and entitlement worksheets.
13. Transfer WTA, tax information and net payment (in pencil) to SF1012. Mark SF1012 block 14 for signature of Approving Official (Auditor).
14. Confirm that funding is present for the entitlement using SAP (*FMX3-Funds Commitment Display Overview*) for general ledger account 6100.1271. Print a copy. Also check consumption of funds to determine if any expenses have previously been applied against this line item. If adequate funding is not present, request additional funding from FM-CS using standard memo.
15. Complete Form FB60 (form is self explanatory).
16. Finalize and initial Voucher Review Checklist.
17. Compile voucher package. Packet should include (in order – only when going to the auditor) the following:
  - a. -Voucher Review Checklist
  - b. d-Permanent Change of Station (Information) Worksheet or moveLinq worksheets
  - c. q -Current FPPS info
  - d. b. -Form FB60
  - e. -Copy of funds commitment information from SAP
  - c. Voucher (SF1012)
  - f. -PCS Relocation Payment Worksheet (payment breakdown)
  - g. -PCS Worksheet for Travel Accounting (tax data)
  - h. -Real Estate Summary Notes/Comments with map (if map is not in file)
  - i. j. -Copies of emails sent or received regarding this transaction
  - j. i. -Signature card (once letter is signed this card is removed and re-used in future vouchers)
  - k. -Form letter on letterhead
  - l. -CG Decision copies, if applicable
  - m. -NF 1338 (two pages)
  - n. -HUD Settlement Statement
  - o. -Any receipts/emails

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- p. -Purchase Agreement
  - q. r. -Miscellaneous information
  - r. s. -Purchase/Sale of a Residence checklist
18. Forward to proper FM-CS for review. Assign Remedy ticket to proper FM-CS. Make appropriate corrections if necessary as requested by auditor and return to auditor for review and approval.
  19. When approved and returned from FM-CS, post voucher in SAP using T-Code FB60. Resolve Remedy ticket; be sure to put 1900# under Travel tab.
  20. Give to PCS Lead who will post in SLA spreadsheet and prepare for payment proposal.

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## Appendix M - Voucher processing via moveLINQ software

1. Receive voucher (*Standard Form 1012*) along with supporting documentation, for the voucher being filed.
2. Pull PCS folder from file cabinet.
3. Complete the Voucher checklist.
4. Open moveLINQ software: <http://internal.nssc.nasa.gov/>
5. Enter User ID and password
6. Select Organization (Center funding the move) and click Submit
7. Click on "Name" to sort list alphabetically to find the relocation for the traveler filing the voucher
8. Click on the vendor # under the Relocation Description column to open the appropriate file. This opens all documents related to this move, the Authorization and vouchers.
9. Scroll down and click on Create Voucher. This is located with the Authorization (or amendment to the authorization). The next screen will show pertinent entitlements to the employee.
10. Choose the entitlement being vouchered. **Only choose one voucher type at a time.** If traveler submitted three vouchers, choose one voucher, work voucher until all expenses are input. Save and Close voucher. Do the same for the remaining vouchers.
11. Click Create Voucher at the bottom of the screen.
12. Input allowable expenses from employees voucher to complete voucher in moveLINQ.
13. Once all expenses are in, click the SAVE button.
14. Go to Tax tab, and update State Tax % and Click SAVE
15. Go to Main tab, click Print Preview. This will pull up the voucher in it's final state
16. Print moveLINQ voucher to attach behind Form 1012 to go to audit with all supporting material.
17. Close Voucher or it will lock the voucher file.
18. Close Relocation or it will lock the relocation file.

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## Appendix N - Estimate processing via moveLINQ software

### Step 1

Employee Identification Number

Go to the One NASA web page at <https://onenasa.ndc.nasa.gov/> to obtain the UUPIC #

1. Enter employee's first, middle and last name
2. Click view
3. Write down UUPIC#
4. Go to moveLINQ website at <http://cos.nssc.nasa.gov/moveLINQ/relologin.aspx> and login.

### Step 2

Relocation Information – (Use NF 1450) **Enter all information in CAPS**

1. Choose appropriate center
2. Click submit
3. Click file new
4. Enter employee UUPIC #
  - a. enter the last name if UUPIC # is unavailable
5. Enter first name
6. Enter MI
7. Enter last name
8. Enter employee vendor # in the Relocation Description field
9. Enter type of relocation
10. Enter type of relocation travel
11. Report date enter employee enter on duty date (EOD)
12. Enter employees TA # in the Order No field

Accounting Code Parts – (Use SAP worksheet located in the traveler's folder second tab)

1. Using the drop down enter the Fund
2. Using the drop down enter the GLA
3. Using the drop down enter the Cost Center
4. Using the drop down enter the Order
5. Using the drop down enter the WBS Element
6. Using the drop down enter the Provider
7. Save

### Step 3

Employee Information

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Select Employee from top menu

1. Complete both sides with employee's current/new home address (Information to fill in this section can be located in the folder on either the NF1450 or NF1449).
2. Current/new duty station address
3. City, state, zip, email address, and phone numbers.
  - a. If the city is not in the drop down select unlisted then type city

Employee Miscellaneous Info fill in the following (NF1450)

1. COS Type: enter PCS, TCS, FDS 5 USC 9811 or First Duty Station
2. Employee Vendor: enter vendor #
3. Funds Document: enter 400# see previous page example

Employee Family

1. If employee is single leave blank
2. If employee has dependents add each dependents name and date of birth (no date of birth necessary for spouse)

Then save and close

Follow Up

1. Choose file open select vendor under relocation description double click
2. Select relocation and employee tabs verify all information entered

#### **Step 4**

Authorization Information

1. Click create authorization
2. Create each entitlement that the employee has been authorized (use RELO Package, NF1450, NF1449 and the funding estimate sheet).
3. Select Tax Info from menu bar
4. Enter tax rate in the State W/H Tax Rate field: If there is no tax rate go to step 5
5. Save

Comments - Enter any remarks deemed necessary from the NF1450 remarks section

Signing Information

1. Employee Signature Date: Enter date employee signed service agreement

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2. Approving Official Signature: Enter web form received date

Save

You have completed entering the employee information and authorization