



Change of Station

**NASA's Guide to a Successful
Move in the Continental United
States (CONUS)**



TABLE OF CONTENTS

PREFACE	5
INTRODUCTION	6
CHAPTER ONE – GET READY	8
Employee Service Agreement and Duplicate Reimbursement Disclosure Statement (FTR 302-2)	8
Agreement to Repay Withholding Tax Allowance	8
Travel Information Request.....	9
Relocation Allowances for Employees	9
Assigned to First Official Station (FTR 302-3.2 Table A)	9
Transfer between Official Stations (FTR 302-3.101 Table A)	10
Last Move Home for SES Career Appointees upon Separation (FTR 302- 3.101 Table G)	11
Temporary Change of Station (TCS) (FTR 302-3.101 Table H).....	11
Binding Decisions	12
Travel Authorizations	12
Advance of Funds (FTR 302-2).....	13
Travel Vouchers.....	14
CHAPTER TWO – GET SET	15
Househunting Trip (FTR 302-5)	15
Lodgings-plus Reimbursement Method	16
Lump Sum Reimbursement Method	16
Movement of Household Goods (FTR 302-7)	16
Origin and Destination of Household Goods Shipment.....	17
Items Authorized to be Shipped as Household Goods.....	17
Items NOT Authorized to be Shipped as Household Goods	17
Insuring Household Goods	18
Storage of Household Goods.....	18
CHAPTER THREE - Go!	19
En route Travel (FTR 302-4).....	19
Allowable Expenses.....	19
Temporary Quarters (FTR 302-6)	21

Eligibility	21
Time Limitations.....	22
Reimbursable Methods	22
Allowances for Expenses Incurred in Connection with Residence Transactions (FTR 302.11).....	24
Selling Your Home	25
Property Management Services (FTR 302-15)	27
Buying a New Home	27
Unexpired Leases	29
Miscellaneous Expense Allowance (FTR 302-16).....	30
Reimbursable Expenses	30
Non-reimbursable Expenses.....	31
Chapter 4 - After The Finish Line.....	33
Travel Vouchers.....	33
Tax Information (FTR 302-17).....	33
Loss or Damage Claims.....	35
FINAL COMMENTS	36
APPENDICES.....	37
APPENDIX A - Checklist of Required Forms	38
Transferee/NASA Flex	38
First Duty	39
Senior Executive Service (SES) Last Move Home.....	40
Temporary Change of Station (TCS)	41
APPENDIX B –Summary of Allowances and Exclusions	43
Allowances.....	43
Exclusions.....	46
APPENDIX C - Glossary of Terms	47
APPENDIX D - Statement on Violation of Service Agreement	55
APPENDIX E - A Helpful Checklist of Things to Do	56
APPENDIX F – Reimbursable and Non-Reimbursable Residential Transactions.....	61
APPENDIX G - Home Marketing Incentive Program.....	64
Award Payments.....	64

Additional Information	64
Benefits	64
Eligibility	65
Tax Consequences	65
APPENDIX H - NASA Relocation Highlights	66
Pre-Transfer Counseling	66
Destination Services	66
Departure Area Services – Home Sale Assistance	66
Marketing Assistance	67
Listing Your Home	67
The Appraisal Process	67
Equity Advance	69
The Amended Sale	69
The NASA Home Sale Marketing Incentive Program	69
Final Highlight	69
Appendix I	71

PREFACE

Congratulations on your relocation with NASA! We hope your move is as smooth and trouble-free as possible.

Moving is never easy; there is very little time and many decisions need to be made. During your relocation, you are going to get a lot of advice from many sources. It is important to NASA that you and your family make positive, well-informed decisions regarding your relocation.

Educate yourself and your family about the relocation process so you will know what to expect. That is why we are asking you to take time out of your now-even-busier schedule to read this guide. It explains most of what you will need to know to have a successful move. In fact, it was designed to be used as a tool for managing your relocation.

This publication is not only a “how-to” guide, but also a “things-to-do” list. Each time there is an item discussed that you will need to attend to, you will be provided with a box in the wide margin. As you get closer to your actual move, you can zero in on the boxes that are still blank.

If you ever feel that you need more specific information on any topic, ASK! Contact your Relocation Counselor or the NASA Shared Services Center (NSSC) Customer Contact Center, whichever is appropriate. There is no such thing as a trivial question when it comes to relocation. Remember, the responsibility for a problem-free, reimbursable move rests with NASA and you.

INTRODUCTION

This guide is for NASA Employees preparing to make a change of station in CONUS. It contains helpful information to assist you during your Government-authorized move.

The guide outlines the allowances and expense reimbursements you are entitled to under the Federal Travel Regulation (FTR). However, it is important to note that this guide is not a copy of the FTR. Information in the FTR, Section 302 is far more detailed. Therefore, if there are any discrepancies between this guide and the FTR, the FTR overrides any information contained herein.

Eligibility - An employee relocating in the interest of the Government is eligible for a number of allowances and reimbursements. Two or more employee members of the same immediate family, relocating in the interest of the Government, are allowed to receive separate relocation orders and benefits. The relocation would be treated separately; however, there will be no duplicate payment for the same expense.

A First Duty Station Employee should refer to En route and Household Goods Transportation and Storage sections of this guide only.

Coverage - There are a few rules governing NASA's ability to pay for your relocation expenses.

- The distance between the **new** duty station and the **old residence** must be at least 50 miles **greater** than the **old** duty station and the **same residence**, unless the head of the agency or designee authorizes an exception.
- You must sign a 12-month Service Agreement.
- You must sign a Duplicate Reimbursement Disclosure Statement.
- You must complete your travel – including transportation for your family and household goods – within 1 year from the effective date of your change of official station. This 1-year limit includes settlement of real estate transactions; however, the limit may be extended for an additional year upon request to the travel authorizing official. The 1-year period may also be extended if interrupted by active military service.

NOTE: Whenever documentation (e.g., contracts, bills, receipts, etc.) is faxed to the NSSC, a fax template (NSSC Form 023) should be included as a cover sheet. The fax should be sent to 1-866-779-NSSC (1-866-779-6772).

The fax template for submitting travel documentation can be found on the NSSC website at <http://www.nssc.nasa.gov>.

CHAPTER ONE – GET READY...

The Federal Travel Regulation (FTR) requires NASA to inform you of a transfer within a timeframe that will provide sufficient time for preparation. Once you have been notified of a transfer, there are a number of things that need to be done before you make any plans regarding a change of station (COS). This chapter describes how to begin. Appendix A includes a checklist of the forms required for a Transferring/NASA Flex employee, First Duty Station employee, Senior Executive Service (SES) employee, and Temporary Change of Station (TCS) employee.

Employee Service Agreement and Duplicate Reimbursement Disclosure Statement (FTR 302-2)

You must sign a Service Agreement and Duplicate Reimbursement Disclosure Statement (NASA Form 1337 for Transferee/NASA Flex or NASA Form 420 for First Duty Station) before travel orders can be issued. By signing the Service Agreement, you agree to remain in government service for at least 12 months after the Enter on Duty (EOD) date of the relocation. TCS moves do not require a Service Agreement.

By signing the Duplicate Reimbursement Disclosure Statement, you agree that you will not and have not received duplicate reimbursement for your relocation expenses either from a federal source or private sector entity.

In the event an employee violates the terms of a Service Agreement or Duplicate Reimbursement Disclosure Statement, including failure to effect the transfer, any monies spent by NASA for such travel, transportation, and allowances will be recoverable as a debt due NASA unless the reason(s) for separation is beyond the control of the employee and is acceptable to the responsible officials of NASA. See Appendix D for *Statement on Violation of Service Agreement*.

To Do: Complete NASA Form 1337, "Service Agreement /Duplicate Reimbursement Disclosure Statement – Transferred Employee" Or NASA Form 420, "Service Agreement/Duplicate Reimbursement Disclosure Statement – First Duty Station Appointment".	
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Agreement to Repay Withholding Tax Allowance

After signing the Service Agreement and Duplicate Reimbursement Disclosure Statement, you will need to complete NASA Form 1810, *Agreement to Repay Withholding Tax Allowance*. Each time an employee is reimbursed for moving expenses which are subject to Federal withholding tax, a Withholding Tax

Allowance (WTA) is calculated. The WTA is paid by the Government as an advance toward the final Relocation Income Tax (RIT) allowance. The WTA is applied to taxable reimbursements each time a claim (voucher) is processed.

The employee is agreeing to submit the required tax information and claim for the RIT within a reasonable length of time after the receipt of the RIT package from the NSSC. Failure of the employee to comply with this requirement will preclude the agency's payment of the WTA. As a result, the entire WTA will be considered an excess payment if the RIT claim is not submitted.

To Do: Complete NASA Form 1810, "Agreement to Repay Withholding Tax Allowance."

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Travel Information Request

After signing the Service Agreement, you will need to complete a Travel Information Request form (NASA Form 1449C) that details where you and your household goods will be moved, names of your immediate family, etc.

This information will help determine which allowances and entitlements will be authorized. Since your travel authorization documents will be prepared on the basis of the information in this form, it is important that you fill it out in detail. It must be completed before the authorization process can be completed.

To Do: Complete NASA Form 1449C, "CONUS-Information Covering Persons Transferred or Appointed to First Duty Station."

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Relocation Allowances for Employees

Assigned to First Official Station (FTR 302-3.2 Table A)

Relocation allowances that agency must pay or reimburse	Relocation allowances that agency has discretionary authority to pay or reimburse
1. Transportation for employee & immediate family member(s) (Part 302-4 Subpart A)	1. Shipment of privately owned vehicle (POV) (Subpart B of Part 302-9)
2. Per diem for employee only (Part 302-4)	
3. Transportation & temporary storage of household goods (Part 302-7)	

**NASA's Guide to a
Successful Move (CONUS)**

Subpart A)	
4. Extended storage of household goods (Part 302-8 Subpart A)*	
5. Transportation of a mobile home or boat used as primary residence in lieu of the transportation of household goods (Part 302-10 Subpart A)	

*Only when assigned to a designated isolated official station in CONUS.

Transfer between Official Stations (FTR 302-3.101 Table A)

Relocation allowances that agency must pay or reimburse	Relocation allowances that agency has discretionary authority to pay or reimburse
1. Transportation & per diem for employee & immediate family member(s) (Part 302-4 Subpart A)	1. Househunting per diem & transportation, employee & spouse only (FTR 302-5 Subpart A)
2. Miscellaneous moving expense (Part 302-16 Subpart A)	2. Temporary quarters subsistence expense (TQSE) (FTR 302-6 Subpart A)
3. Sell or buy residence transactions or lease termination expenses (Part 302-11 Subpart A)	3. Shipment of privately owned vehicle (POV) (Subpart B of Part 302-9 Subpart A)
4. Transportation & temporary storage of household goods (Part 302-7 Subpart A)	4. Use of relocation services company
5. Extended storage of household goods (Part 302-8 Subpart A)*	5. Property management services (Part 302-15 Subpart A)
6. Transportation of a mobile home or boat used as primary residence in lieu of the transportation of household goods (Part 302-10 Subpart A)	6. Home marketing incentives (Part 302-14)
7. Relocation income tax allowance (RIT) (Part 302-17 Subpart A)	

*Only when assigned to a designated isolated official station in CONUS.

Last Move Home for SES Career Appointees upon Separation (FTR 302-3.101 Table G)

Relocation allowances that agency must pay or reimburse	Relocation allowances that agency has discretionary authority to pay or reimburse
1. Transportation for employee & immediate family member(s) (Part 302-4 of this chapter).	1. Shipment of privately owned vehicle (POV) (Subpart B of Part 302-9 of this chapter).
2. Per diem for employee only (Part 302-4 of this chapter).	
3. Transportation & temporary storage of household goods (Part 302-7 of this chapter).	
4. Transportation of a mobile home or boat used as a primary residence in lieu of the transportation of household goods (Part 302-10 of this chapter).	

Temporary Change of Station (TCS) (FTR 302-3.101 Table H)

Allowances that Agency must pay or reimburse (FTR 302-3.412)	Allowances that Agency has discretionary authority to pay or reimburse (FTR 302-3.413)
1. Transportation & per diem for employee & immediate family member(s) (Part 302-4)	1. Househunting per diem & transportation, employee & spouse only (Part 302-5)
2. Miscellaneous expense allowance (Part 302-16)	2. Temporary quarters subsistence expense (TQSE) (Part 302-6)
3. Transportation & temporary storage of household goods (Part 302-7)	
4. Transportation of a mobile home or boat used as primary residence in lieu of the transportation of household goods (Part 302-10)	
5. Transportation of privately owned vehicle (POV) (Part 302-9 Subpart B)	
6. Relocation income tax allowance (RIT) (Part 302-17)	
7. Property management services (Part 302-15)	

Binding Decisions

In order for NASA to more effectively manage its Relocation Services Program, you will be required to make **binding decisions** at the beginning of your relocation. If offered by the paying Center, decide whether you want the Lodgings-plus or the Lump Sum Amount Reimbursement Method for your househunting trip; whether you want the Actual Expense or the Lump Sum Amount Reimbursement Method for temporary quarters; and/or whether you want Property Management services instead of the Home Sale entitlement at the old duty station. If you choose Property Management Services in lieu of the Home Sale entitlement, you must decide whether you want to utilize the Property Management services of the Agency Relocation Contractor or whether you plan to arrange your own Property Management services. Binding decisions must be made before your travel authorization can be prepared.

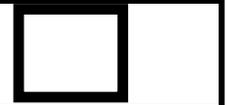
To Do: If authorized a househunting trip, decide between the Lodgings-plus and the Lump Sum Reimbursement Methods. Complete NASA Form 1807, "Househunting Trip Binding Decision."	<input type="checkbox"/>
To Do: If authorized temporary quarters, decide between the Actual Expense Method and the Lump Sum Reimbursement Method. Complete NASA Form 1809, "Temporary Quarters Subsistence Expenses (TQSE) Binding Decision."	<input type="checkbox"/>
To Do: If authorized Property Management services instead of the Home Sale entitlement, decide between using the Agency Relocation Contractor services and arranging your own services. Complete NASA Form 1808, "Property Management Binding Decision."	<input type="checkbox"/>

Travel Authorizations

After you have signed a Service Agreement and Duplicate Reimbursement Disclosure Statement, chosen binding decisions, and completed NASA Form 1449C, the NSSC will complete NASA Form 1450C, "Authorization - Change of Official Station." This form is the key to an authorized move. When signed by the approving official, you will have the authority to incur expenses necessary to move you and your family. These expenses may include: a househunting trip, transportation of household goods, storage of household goods, transportation, temporary quarters subsistence expenses, miscellaneous expense allowance, real estate and unexpired lease expenses, en route, use of relocation service companies, shipment of privately owned vehicle, relocation income tax allowance, etc. The signed/approved authorization specifies your allowances. **Read it carefully.** If you have any questions, ASK. Before you spend any resources on your move, contact the NSSC with questions about anything not

specifically authorized on the Travel Authorization. Be sure to clarify any issues as soon as possible. Once you begin to incur expenses, an authorization cannot be changed.

To Do: Obtain NASA Form 1450C, "CONUS Change of Official Station Authorization" from the NSSC and ensure it is accurate.



Advance of Funds (FTR 302-2)

NASA travelers can only receive travel advances through the Government-issued travel card via ATM advances. Exceptions are limited to the following:

- Pending travel charge card application
- First Duty Appointee
- No NASA-issued travel charge card

If you meet the exceptions above, an advance of funds may be authorized for travel and transportation expenses; but they must be authorized on your travel authorization. You will need to complete Standard Form 1038 to request an advance of funds. The outstanding travel advance will be offset against the travel reimbursement vouchers as they are received, regardless of what expense is claimed on the voucher.

The following may be funded in advance:

- Per diem, mileage, and common carrier costs anticipated for the employee and family's househunting trip (if authorized) (FTR 302-4.600, FTR 302-5.16)
- Estimated allowable temporary quarters subsistence expense for up to 30 days; subsequently, funds may be approved for additional periods up to 30 days (FTR 302-6.15)
- Transportation and temporary storage of household goods or transportation of a mobile home, only if approved for by commuted rate method (FTR 302-7.105)

The following cannot be funded in advance:

- Miscellaneous expense allowance (FTR 302-16.101)

- Real estate transactions and unexpired leases (FTR 302-11.307)
- Transportation and temporary storage of household goods or transportation of mobile home if by actual expense method (since the Government pays the mover directly) (FTR 302-7.105)

The travel advance cannot be issued earlier than 4 weeks before you expect to incur the related expense. Allow at least 2 weeks to process the advance. The Relocation Contractor will obtain the Direct Deposit information needed to process your advance.

To Do: If approved to receive an advance, complete Standard Form 1038, "Advance of Funds Application."



Travel Vouchers

You will need to complete travel vouchers as you incur expenses for the various allowances. These vouchers validate your expenditure of advanced funds and facilitate reimbursement for expenditures not advanced. The process for filing travel vouchers is explained in more detail in Chapter 4.

It is strongly encouraged that employees keep all receipts related to their relocation. Receipts are **required** for all lodging, groceries, and expenses greater than \$75. If a claim is determined to be unreasonable, you will be required to substantiate all related expenses with receipts.

A receipt is a written/printed acknowledgement from a vendor to the authorized employee or family for payment(s) received for goods or services provided. For a more detailed definition of a valid receipt refer to Appendix C, Glossary of Terms, contained in this guide.

Additionally, employees are encouraged to call the NSSC Customer Contact Center at 1-877-NSSC-123, if you have any questions regarding completion or filing of travel vouchers or go to the NSSC Customer Service website at www.nssc.nasa.gov/portal/site/customerservice.

CHAPTER TWO – GET SET...

Now that you are officially moving to a new duty station, you need to find a new home and move your household goods.

Househunting Trip (FTR 302-5)

The term “househunting trip” refers to a trip made by the employee and/or spouse to the new official station locality to find permanent living quarters to rent or purchase. The term “living quarters” in this part includes apartments, condominiums, and cooperatives in addition to townhouses and single family homes.

If there is less than 75 miles between the old and new duty station, you will not be authorized a househunting trip. (FTR 302-5.3)

It is not mandatory for NASA to authorize payment of a househunting trip expense allowance. NASA may provide one househunting trip for you and your spouse, either together or separately. If you and your spouse take the trip separately, the total reimbursement is limited to the cost of one round-trip for both of you had you been traveling together. The trip may not exceed 10 days including travel time.

Househunting trips must be approved on the travel authorization. Transferees must complete their househunting trip the day before they report for duty at the new duty station. Spouses may start and complete their househunting trip before or after the employee's enter on duty (EOD) date. It is the responsibility of relocating employees to arrange suitable release, EOD, and househunting trip dates. Childcare and animal boarding expenses are not reimbursable expenses for the househunting trip.

The number of days used for a househunting trip count toward your 1st 30 days actual expense temporary quarters reimbursement and your total authorized number of days for temporary quarters. So if you take a 10-day househunting trip, your first day of Temporary Quarters Subsistence Expense (TQSE) will actually be the 11th day of your first 30 days of temporary quarters.

Additionally, consistent with FTR 302-5.6 (d), NASA requires that employees must demonstrate they incurred costs in conjunction with performing a househunting trip to be eligible for reimbursement.

To Do: During your Relocation Counseling appointment, choose a reimbursement method by completing NASA Form 1807.

<input type="checkbox"/>	<input type="checkbox"/>
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There are two methods for reimbursement: Lodgings-plus Reimbursement Method and the Lump Sum Reimbursement Method, which are described in detail below:

Lodgings-plus Reimbursement Method

Reimbursement includes round-trip transportation expenses for the employee and spouse by common carrier, or a mileage allowance when POV is authorized, and per diem allowance not to exceed the standard CONUS rate.

Lump Sum Reimbursement Method

Reimbursement includes round-trip transportation expenses for the employee and spouse by common carrier, or a mileage allowance when POV is authorized. The maximum per diem allowance is determined by multiplying the applicable locality rate by 5 for an employee only or by 6.25 for the employee and spouse traveling together or separately. You will **not** be required to document your daily subsistence expenses. However, you will be required to provide documentation to show evidence that the househunting trip was performed.

NASA employees may choose to use the Lodgings-plus Reimbursement Method or the Lump Sum Reimbursement Method for their househunting trip. You must make this binding decision when completing the NASA Form 1807 before your authorization is prepared.

To Do: Make transportation reservations for househunting trip.

<input type="checkbox"/>	<input type="checkbox"/>
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Movement of Household Goods (FTR 302-7)

Moving your belongings is probably one of the most difficult parts of your relocation. Advance planning should save you considerable time and aggravation.

The maximum weight allowance of household goods that may be shipped or stored at Government expense is 18,000 pounds net weight plus 2,000 pounds of packing materials. The weight of professional books, papers, and equipment (PBP&E) counts against the 18,000 pound limit. However, if

the weight of any PBP&E causes the lot to exceed 20,000 pounds, the PBP&E may be transported to the new duty station as an administrative expense of the agency, but only at NASA's discretion.

Generally, NASA will assign a moving company and pay the cost on a Commercial Bill of Lading (CBL). If you are authorized the commuted rate method on your travel orders, you will be reimbursed based upon proper receipts and documentation. If you are authorized a CBL on your travel orders, and choose a professional moving company yourself (commuted rate) or choose a "do-it-yourself" move, you will be reimbursed for allowable expenses incurred up to the cost of the CBL. Additionally, employees are advised that there are expenses which cannot be paid on a "do-it-yourself" move, such as a car tow bar and insurance.

Origin and Destination of Household Goods Shipment

Household goods may be shipped from your old home to the home or storage at your new station. Items may be shipped from different locations at the old station to different locations at the new station. The total cost of doing so cannot exceed the cost of moving the items in one shipment.

For example, if you have some furniture in storage near your old home, NASA will pay to have the stored furniture, as well as your housed furniture, moved provided doing so does not exceed the cost of doing it all at once. If you have household goods in more than one lot, contact your Relocation Counselor or the NSSC Customer Contact Center to determine your entitlements.

Items Authorized to be Shipped as Household Goods

NASA will provide for the shipment of: household furnishings, equipment and appliances, furniture, clothing, books, two- or three-wheeled vehicles, and similar personal property which belong to the employee and immediate family. Residential riding lawn mowers may be included but not farm tractors used for cutting fields of grass. Personal watercraft such as canoes, rowboats, jet skis, etc. may also be included, but not sailboats, power boats, etc.

Items NOT Authorized to be Shipped as Household Goods

NASA cannot include in the shipment of household goods: automobiles or other passenger vehicles, airplanes, mobile homes, camper trailers, boats, birds, pets, livestock, cordwood, building materials, items that are for resale or disposal rather than for use by you or your family, property not belonging to you or your immediate family, or any property intended for use in conducting a business or other commercial enterprise. If you have a specific question about something

you want to ship, be sure to ask your Relocation Counselor or the NSSC before making arrangements.

If you intend to reside in a mobile home at your new station, the expense of transporting the mobile home between the old and new stations is reimbursed in lieu of transportation of household goods (FTR 302-10). The definition of a mobile home includes a boat used as the employee's primary residence. The necessary costs of preparing a mobile home for movement and resettling it at the new destination is a reimbursable transportation expense. Please see your Relocation Counselor for more details.

Note: NASA may authorize the shipment of a POV in a separate allowance if it is determined to be cost effective and advantageous to the Government.

Insuring Household Goods

You may want to purchase transit insurance to insure your goods against damage or loss. However, please note that the cost of this insurance is not reimbursable.

Storage of Household Goods

In connection with transportation of household goods, you may be authorized to temporarily store your goods at your new station. The NASA Relocation Counselor will arrange for the temporary storage, and NASA will pay the costs directly. Storage arrangements must be made by travelers who complete self-moves. Travel vouchers will need to be submitted for reimbursement.

The time allowable for temporary storage in connection with an authorized shipment of household goods CONUS may not exceed **60** days. Under certain circumstances, you also may be able to qualify for an extension. Under unusual circumstances (location to isolated posts), you may qualify for "non-temporary" storage. Contact your Relocation Counselor if you believe you may qualify for these unusual conditions.

You are responsible for the payment of taxes incurred for the storage of household goods in excess of 30 days. If the storage costs over 30 days are paid directly by NASA, you will receive a bill of collection for the taxes incurred. If you arrange your own storage and receive reimbursement, the taxes will be withheld from the payment. This is an IRS requirement (IRS Publication 521) and cannot be waived.

CHAPTER THREE - GO!

Now that you are on your way, you will need to know just a few things while traveling en route to your new destination.

En route Travel (FTR 302-4)

En route travel is the travel period the employee will be allowed to travel from the old duty station to the new duty station. The employee and his/her immediate family may travel together or separately.

Allowable Expenses

Transportation Expense

NASA will determine through a cost comparison process if it is cost effective and advantageous to the Government to ship your vehicle(s) and provide you and your family member(s) common carrier transportation in lieu of driving a POV. NASA will authorize the mode most advantageous to the Government. If it has been determined that it is more advantageous to the Government to ship a vehicle from one location to another, that method becomes the preferred method. If you choose to do otherwise, a constructed travel voucher will be required. You will be reimbursed at the lower cost and will be required to take leave for any excessive travel days. If you are not familiar with constructed travel vouchers, contact the NSSC Contact Center.

Driving the Privately Owned Vehicle (POV) (FTR 302-4)

If you are authorized to drive to your new station, you may choose any origination point, route, and destination point you would like. However, please note that you will only be reimbursed for the cost of transportation by the usually traveled direct route between your old location and the new official station. You are required to drive an average of at least 300 miles per day (FTR 302-4.400). You will be reimbursed at the mileage rate as prescribed by GSA. Like the per diem rate, the mileage reimbursement rate is subject to change, so please check with your Relocation Counselor or the NSSC for current rates.

Reimbursement for more than one POV must be authorized in advance on the travel authorization (FTR 302.4-501). More than one POV may be allowed when:

- A POV cannot reasonably transport your entire family together with luggage.

- A family member's age or physical condition necessitates special accommodations in one POV.
- You must report to the new station before your family can feasibly leave the old residence (end of school year, etc.).
- Family members must take up residence at the new station in advance of your reporting date (beginning of a new school year, etc.).
- Members of your family travel between more than one set of authorized points of travel.

Shipment of Privately Owned Vehicle (FTR 302-9 Subpart D)

NASA may authorize the shipment of a POV in connection with the transfer of an employee within CONUS when this mode is more advantageous to the Government. A cost comparison is prepared utilizing a standardized Agency model. The model compares the cost of travel by POV (including mileage, per diem, and productivity costs) to the cost of shipping the POV (including shipping, air travel, and productivity costs). A separate cost comparison is done for each vehicle that has been authorized, limited to two vehicles.

If shipment of a POV is authorized, NASA will pay for all necessary and customary expenses directly related to the transportation of the POV (including crating and packing, shipping and port charges for readying the POV for shipment at the port of embarkation and for use at the port of debarkation).

CAUTION: Regulations do not allow NASA to reimburse the cost of a rental car at either the old or new duty station.

To Do: Make transportation reservations for en route travel if common carrier is the mode of transportation.	
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Per Diem Expense

You are allowed per diem while you are traveling to your new station. For transfers within CONUS, the per diem allowance for allowable en route travel between the destination from where the employee is relocating and the new official station is not to exceed the Standard CONUS rate. The Standard CONUS rate is prescribed by GSA. NASA will pay per diem according to the following guidelines:

- En route travel begins the day you actually leave the destination from where you are relocating and ends the day you arrive at the new station.
- If traveling by POV, per diem will be allowed on the basis of actual travel time.
- You will be reimbursed three-quarters of the meal and incidentals expense (M&IE) rate for the first and last day of en route travel.
 - If your spouse/domestic partner travels with you, the maximum allowed per diem is three-fourths your rate. If traveling separately and authorized for separate travel, your spouse/domestic partner is allowed full per diem.
 - Other family members 12 years or older are allowed per diem up to three-fourths your rate; younger than 12 years are allowed per diem up to one-half your per diem rate.

To Do: Prepare and submit a Standard Form 1012, Travel Voucher, for en route travel expenses.	
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Temporary Quarters (FTR 302-6)

Under certain conditions, you may be reimbursed for the expense of occupying a temporary residence until a permanent residence can be obtained. The term temporary quarters refers to “lodging obtained from a private or commercial source for the purpose of temporary occupancy after vacating the residence occupied when the transfer was authorized”. Temporary quarters must be authorized on the travel authorization.

Eligibility

You are not automatically entitled to temporary quarters subsistence expense (TQSE) reimbursement. NASA will determine if it is in the Government's interest to pay TQSE (FTR 302-6.6). The distance between your old official station and new official station needs to be at least 50 miles apart in order for you to qualify for this allowance.

You may occupy temporary quarters at one location (usually the new or old duty station) while the members of your immediate family occupy temporary quarters at another location (usually the new or old duty station).

Additionally, employees must provide a lodging receipt to substantiate their claim for TQSE. Your lodging receipt must be one of the following:

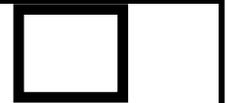
1. A commercial lodging receipt showing itemized costs paid, location, dates, and by whom occupied; or
2. A temporary lease rental agreement showing the terms of the lease agreement accompanied with a proper proof of payment (see definition of a receipt in NASA's Guide to a Successful Move). Note: A TQSE voucher submitted with a lease agreement but without a proper proof of payment is an invalid claim; you must submit a lease agreement with a receipt/proof of payment.

Time Limitations

NASA employees may choose to use the Actual Expense Method or the Lump Sum Reimbursement Method for their TQSE. You must make this binding decision when completing the NASA Form 1809 before your authorization is prepared.

You may be authorized to claim actual reimbursement TQSE in increments of 30-days or less, not to exceed 60 consecutive days. An additional 60 days may be authorized if individual circumstances are deemed compelling by the authorizing official. Under no circumstances may you be authorized reimbursement for actual TQSE for more than a total of 120 consecutive days (FTR 302-6.104).

To Do: During your Relocation Counseling appointment, choose a reimbursement method by completing NASA Form 1809.	
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Reimbursable Methods

Actual Expense

NASA will pay actual TQSE incurred, provided expenses are reasonable and do not exceed the maximum allowable amount.

Maximum Allowable Amount: The "maximum allowable amount" is the "maximum daily amount" multiplied by the number of days you actually incur TQSE not to exceed the number of days authorized, taking into account that the rates change after 30 days in temporary quarters (see Maximum Time Allowable below).

Reimbursement for subsistence expenses is on an actual expense basis. Actual expenses for lodging, meals, and all other items of subsistence expenses must be itemized on a daily basis. *Where groceries are claimed in lieu of meals, you shall submit all receipts.* All lodging receipts and receipts for any subsistence

expense in excess of \$75 are required to be submitted with the voucher. Although other receipts are not required, they should be retained regardless of amount in case expenses are deemed to be unreasonable. Local transportation expenses during temporary quarters are not reimbursable.

Temporary quarters subsistence expenses are for a consecutive-day period only. This entitlement does not run separately for the employee and their families, but runs concurrently for all family members (FTR 302-6.109). Employees may be reimbursed for the "fixed costs" portion of per diem if they are required to perform TDY while in temporary quarters, or they may elect to extend their entitlement period. "Fixed costs" are those authorized entitlements other than meals. These include lodging, furniture rental, utilities, and cable TV. Limits to the amounts of reimbursement you may receive under this allowance exist.

Maximum Time Allowable: Maximum time allowable is 60 days. An additional period not to exceed 60 days may be authorized for compelling reasons. You must request additional days for temporary quarters through your Relocation Counselor and provide justification in writing to the Relocation Program Office at the NSSC. Temporary storage is not automatically extended when requesting additional temporary quarters.

1st 30-Day Period: You or an unaccompanied spouse (i.e., the spouse may occupy temporary quarters in a location separate from the employee), are allowed a daily rate up to the Standard CONUS rate. The Standard CONUS rate can be located at <http://www.gsa.gov/perdiem>. For this example, we will be using a Standard CONUS rate of \$123.00/day. The following rates are applicable to family members for temporary quarters.

Employee or unaccompanied spouse	\$123.00
Accompanying spouse (75% of \$123.00)	\$92.25
Each family member 12 years or older (75% of \$123.00)	\$92.25
Each family member under 12 years (50% of \$123.00)	\$61.50

Note: Any househunting trip days reimbursed will be counted toward the 1st 30 day period and the maximum number of temporary quarters days.

2nd 30-Day Period and Additional 60 days, if authorized: The following rates are applicable to family members for temporary quarters in excess of the 1st 30 day period:

**NASA's Guide to a
Successful Move (CONUS)**

Employee or unaccompanied spouse (75% of \$123.00)	\$92.25
Accompanying spouse (50% of \$123.00)	\$61.50
Each family member 12 years or older (50% of \$123.00)	\$61.50
Each family member under 12 years (40% of \$123.00)	\$49.20

NASA has determined that TQSE should be reduced or not allowed if the employee had adequate opportunity to complete arrangements for permanent residence quarters as the result of an extended TDY assignment at the new official station or under other circumstances at the decision of the Agency. However, if TQSE is authorized, NASA has determined that for M&IE purposes, costs up to 45% of the daily maximum allowance will be considered reasonable (NPR 302-6.101).

Lump Sum Reimbursement Method (FTR 302-6 Subpart C)

If you select the Lump Sum TQSE Reimbursement method, you are paid a lump sum amount for up to 30 days. Receipts for lodging are required, and no extensions are allowed (FTR 302-6.200).

To determine the amount of your payment under this method, the following information is provided (FTR 302-6.201):

- Employee: 75% of applicable locality rate X authorized days
- Spouse: 25% of applicable locality rate X authorized days
- Child (any age): 25% of applicable locality rate X authorized days

To Do: If claiming Actual Expenses Method, complete a NASA Form 1500, "Claim For Temporary Quarters Subsistence Expense Reimbursement," to maintain an accurate record of your expenses.	<input type="checkbox"/>
To Do: Prepare and submit a SF 1012 "Travel Voucher" for Actual Expense Method for each 30-day period or the Lump Sum Amount Reimbursement Method.	<input type="checkbox"/>

Allowances for Expenses Incurred in Connection with Residence Transactions (FTR 302.11)

(Real Estate Transactions Apply to Change of Station Transferees and NASA Flex ONLY)

You may be reimbursed for expenses associated with the sale of your old home, purchase of your new home, or the breaking of a lease. There are five requirements to be eligible for this reimbursement:

- Any title or interest involved must be in your name and/or your immediate family member's name.
- You must have acquired an interest in the property involved before being informed of the transfer.
- You must settle sales, purchases, and lease terminations within 1 year after reporting for duty at the new station, unless an extension of time has been authorized.
- In cases when expenses are shared with other individuals, reimbursement will be based on your share of the transaction.
- Both the old and new official stations must be within the 50 states, Puerto Rico, the Canal Zone, or territories and possessions of the U.S.

NASA has contracted with a third party to provide you with a comprehensive program to assist you with all phases of your relocation. See Appendix H for more information.

Selling Your Home

There are two potential ways to sell your home. You should investigate all options to determine which method is best for you.

You may sell your home yourself or with the aid of your own real estate agent, and be reimbursed for many expenses incurred with the sale. In selling your home, you are eligible for reimbursements up to 10% of the sale price for allowable expenses.

Additionally, you may be authorized to use the services of the third party relocation service that NASA retains. These services are explained more fully in Appendix H and in the brochure you can obtain from your Relocation Counselor.

NASA has contracted with a third party to provide you with a comprehensive program to assist you with all phases of your relocation. See Appendix H for more information.

Note: NASA pays the total contractor fee for home sales valued up to \$500,000. Employees are responsible for that portion of contractor fees associated with home sales exceeding \$500,000.

In connection with the third party relocation service, NASA offers a Home Marketing Incentive (HMI) payment to a transferred employee to encourage the employee to independently and aggressively market their residence and find a bona fide buyer; thereby reducing the fee/expense NASA must pay the relocation services company. The amount of the incentive payment will be 3% of the amended value price the relocation services company paid the employee for the residence, not to exceed \$15,000. **The relocation services company under contract with NASA must be used to receive the Home Marketing Incentive payment.**

If you use the relocation services contractor to sell the residence at the old duty station and receive the home marketing incentive, the actual temporary quarters subsistence, including any househunting trip, is limited to 60 days with no exceptions (Reference Appendix G, *Home Marketing Incentive Program*). For example, an employee is authorized 60 days temporary quarters. Five days are used for the househunting trip, so a maximum of 55 days temporary quarters may be reimbursed.

Reimbursable Sales Expenses

Provided they are customarily paid by the seller of a residence at the old official station, the following expenses may qualify for reimbursement: (see Appendix F)

- Broker's fees and real estate commissions in connection with selling the home (not in connection with purchasing a home at your new station)
- Advertising expenses (newspaper, bulletin board, and multiple-listing service), not included in the broker's fees or real estate commissions associated with selling your home
- Customary cost of appraisal
- Legal fees such as a title search, title opinion, title insurance; preparing abstracts, conveyances, other instruments and contracts, and notary and recording fees; surveys, and preparing drawings and plats. Note: legal services should be specifically itemized on the attorney's bill and not submitted under the general heading of legal fees.

Note: For a complete list and explanation of each, see FTR 302-11.200.

Non-Reimbursable Sales Expenses

The following expenses are not reimbursable (FTR 302-11.202):

- Any fees that have been inflated or are higher than normally imposed for similar services in the locality;
- Broker fees or commissions paid in connection with the purchase of a home at the new official station;
- Owner's title insurance policy, "record title" insurance policy, mortgage insurance or insurance against loss or damage of property and optional insurance paid for by you in connection with the purchase of a residence for your own protection;
- Interest on loans, points, and mortgage discounts;
- Property taxes;
- Operating or maintenance costs;
- Any fee, cost, charge, or expense determined to be part of the finance charge under the Truth in Lending Act, Title I, Pub. L. 90-321, as amended, and Regulation Z issued by the Board of Governors of the Federal Reserve System (12 CFR part 226, unless specifically authorized in 302-11.200);
- Expenses that result from construction of a residence, except as provided in FTR 302-11.200(e)(10); and
- Losses. See FTR 302-11.304.

Property Management Services (FTR 302-15)

In some situations, property management services may be requested in lieu of the home sale. If approved, NASA will pay the selling expenses of that property at a later date. However, the entitlement will be reduced by the amount of property management entitlements already reimbursed. Property management services are offered by a company for a fee and assist a transferee in retaining and renting, rather than selling his/her residence at the old official station. These services typically include obtaining a tenant, negotiating the lease, inspecting the property regularly, managing repairs and maintenance, enforcing lease terms, collecting the rent, paying the mortgage and other carrying expenses from rental proceeds and/or funds of the employee, accounting for the transactions, and providing periodic reports to the employee. NASA will not pay for items relating to the maintenance, insurance or loss of income on the property. Property Management only relates to the fee charged by the company for their services. The employee may obtain the services directly and be reimbursed up to what the NASA relocation service company would charge, or NASA may contract with the relocation services company to provide these services. If you are interested in this entitlement please contact your Relocation Counselor for further information.

Buying a New Home

Certain expenses associated with purchasing a home at your new duty station are also reimbursed, although not to the extent as in selling your old home. You may be reimbursed up to 5% of the purchase price for allowable expenses.

Reimbursable Purchase Expenses

See Appendix F for details. In general, the following expenses may qualify for reimbursement (FTR 302-11.200):

- Miscellaneous costs including loan origination fees (normally NTE 1%), cost of preparing credit reports, mortgage and transfer taxes, State revenue stamps, charges for prepayment of mortgage (in most cases), the cost of a lenders mortgage title policy; and
- Costs incurred in the construction of a residence, provided these costs are comparable to what the reimbursable cost of purchasing an existing residence would be.

Note: These expenses may or may not be reimbursable based upon what is usual and customary for the area in which you are purchasing a home.

Non-reimbursable Purchase Expenses

The following expenses in the connection with the purchase of a home at your new station are not reimbursable (FTR 302-11.202):

- Broker's fees and real estate commissions
- Losses due to failure to buy a residence at the new station at a price comparable to the selling price of the residence at the old station
- Additional taxes that arise as a result of a change in residence
- Any litigation costs
- Costs of most types of insurance including "record title" policy, owner's title policy, mortgage insurance, and property insurance
- Interest on loans, points, and mortgage discounts
- Funding Fees
- Property taxes
- Operating and maintenance costs

- Expenses determined to be finance charges as defined in the Truth in Lending Act
- Losses due to failure to sell a residence at the old duty station for a certain price
- Legal expenses of an advisory nature

To Do: For real estate expenses, complete NASA Form 1338, "Employee Application for Reimbursement of Expenses Incurred Upon Sale or Purchase of Residence Upon Change of Official Station."	<input type="checkbox"/>	
To Do: Also, complete Standard Form 1012, "Travel Voucher" for these expenses and submit with the NASA Form 1338.	<input type="checkbox"/>	

Note: These two forms should be submitted with the following documentation as applicable: sales agreement, property settlement documents, invoices, receipts for other bills paid, and/or receipts for items paid outside of the contract.

Unexpired Leases

Expenses incurred for settlement of an unexpired lease are reimbursable when (FTR 302-11.7):

- Applicable laws or the terms of the lease provide for payment of settlement expenses; or
- Such expenses cannot be avoided by sublease or other arrangement; or
- You have not contributed to the expenses by failing to give appropriate lease termination notice promptly after you have definite knowledge of your transfer; or
- The broker's fees or advertising charges are not in excess of those customarily charged for comparable services in that locality.

To Do: Complete Standard Form 1012, "Travel Voucher," to document expenses incurred with unexpired lease transactions.	<input type="checkbox"/>	
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Miscellaneous Expense Allowance (FTR 302-16)

The miscellaneous expenses allowance (MEA) is designed to help defray some of the costs incurred due to relocating. The MEA is related to expenses that are common to living quarters, furnishings, household appliances, and to other general types of costs inherent in relocation of a place of residence.

There are two ways to claim this allowance. (1) If you do not want to collect supporting documentation to claim this benefit, you may receive a flat allowance. If you have no immediate family relocating with you, you will receive \$650.00 or the equivalent of 1 week gross pay (whichever is less). If you do have immediate family members relocating with you, you will receive \$1,300.00 or the equivalents of 2 weeks gross pay (whichever is less).

With full supporting documentation, you may claim up to one week basic pay (if you are single) or two weeks basic pay (if you have immediate family). The allowance shall not exceed the maximum rate of a GS-13 at the time the employee reports for duty at the new official station.

Reimbursable Expenses

The following are examples of miscellaneous moving expenses:

- Disconnecting and connecting appliances, equipment, and converting appliances for operation on available utilities
- Utility fees or deposits that will not be eventually refunded
- Losses due to forfeiture of medical, dental, and food locker contracts that are not transferable or refundable
- Automobile registration, driver's license, and use taxes imposed when bringing automobiles into certain jurisdictions
- Cutting and fitting rugs, draperies, and curtains moved from one residence to another – do not include NEW carpets or draperies
- Grandfather clocks – leveling and adjusting after move
- Piano tuning after move
- Telephone – will reimburse to give you service which is comparable to the service at your previous residence, i.e., additional jacks

- Contracts for private institutional care, such as that provided for handicapped or invalid dependents which are not transferable or refundable

Non-reimbursable Expenses

The following are not examples of miscellaneous expenses and cannot be reimbursed (FTR 302-16.203):

- (a) Losses in selling or buying real and personal property and cost related to such transactions
- (b) Cost of additional insurance on household goods while in transit to the new official station or cost of loss or damage to such property
- (c) Additional costs of moving household goods caused by exceeding the maximum weight limitation
- (d) Costs of newly acquired items, such as the purchase or installation cost of a new rug or drapery
- (e) Higher income, real estate, sales, or other taxes as the result of establishing residence in the new locality
- (f) Fines imposed for traffic infractions while en route to the new official station locality
- (g) Accident insurance premiums or liability costs incurred in connection with travel to the new official station locality, or any other liability imposed upon the employee for uninsured damages caused by accidents for which he/she or a member of his/her immediate family is held responsible
- (h) Losses as the result of sale or disposal of items of personal property not considered convenient or practicable to move
- (i) Damage or loss of clothing, luggage, or other personal effects while traveling to the new official station locality
- (j) Subsistence, transportation, or mileage expenses in excess of the amounts reimbursed as per diem or other allowances under this regulation
- (k) Medical expenses due to illness or injuries while en route to the new official station or while living in temporary quarters at Government expense under the provisions of this chapter

- (l) Costs incurred in connection with structural alterations (remodeling or modernizing of living quarters, garages or other buildings to accommodate privately-owned automobiles, appliances or equipment; or the cost of replacing or repairing worn-out or defective appliances, or equipment shipped to the new location).

Note: If you choose to document expenses, allowance shall not exceed the maximum gross pay of a GS-13 provided in 5 U.S.C. at the time the employee reports for duty (FTR 302-16.103).

To Do: Complete Standard Form 1012, "Travel Voucher," to claim the miscellaneous moving expense allowance. Please note that this expense cannot be advanced.



CHAPTER 4 - AFTER THE FINISH LINE

Now that you have arrived, you will need to complete all the paperwork and final details of your move. This chapter outlines how to complete your travel voucher, guidelines on income tax liability you may incur, and how to make damage claims.

Travel Vouchers

To claim reimbursement for any allowed expenses, you must complete a Travel Voucher, Standard Form 1012. If you received a travel advance, you must complete a Travel Voucher to show how you spent the funds that you received. Travel vouchers should be turned in as the expenses are incurred. Be sure to submit *all* supporting documentation, and keep a copy for your file.

Relocation travel vouchers are processed by the NSSC located at Stennis Space Center, MS. Your Center management does not need to sign Relocation travel vouchers; the approving officials are located at the NSSC. Please include your travel authorization number and a daytime phone number on the travel voucher. Reimbursements are made by direct deposit to the banking institution and account information you have on file with Payroll. **Travel vouchers should be faxed to 1-866-779-6772 with a cover sheet, emailed to nssc@nasa.gov or mailed to NSSC, Building 1111, Attn: Document Control, Stennis Space Center, MS 39529.**

To Do: Complete a Travel Voucher, SF 1012, for reimbursement of expenses or to account for an advance of funds.	
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Tax Information (FTR 302-17)

The Internal Revenue Service requires all employers to withhold taxes from the reimbursement of various moving expenses. Transferees are entitled to a Relocation Income Tax (RIT) allowance to reimburse substantially all of the additional Federal, State, and local income taxes incurred. However, only the expenses actually paid or incurred and not allowed as a moving expense deduction for tax purposes are covered by the RIT allowance. **This allowance is not available to new appointees.**

NOTE: It is imperative to understand that your vouchers will be processed in accordance with your current tax elections (including state of residency)

within NASA's official personnel and payroll system of record, the Federal Personnel Payroll System (FPPS), at the time vouchers are received. To verify your current tax elections, please contact the payroll office by sending an email to nssc-contactcenter@nasa.gov or you may call 1-877-677-2123.

Please review the following chart outlining taxable allowances and RIT coverage:

Allowances	Subject to Taxes	Covered by RIT
1st 30 days Temp Storage	N	N/A
Additional Storage over 30 days	Y	Y
Extended Storage	Y	Y
En route Lodging	N	N/A
En route Meals	Y	Y
En route Transport/Contract Hotel	N	N/A
Home Marketing Incentive	Y	N
Househunting Lodging	Y	Y
Househunting Per Diem	Y	Y
Househunting Transportation	Y	Y
Lease Breaking Expense	Y	Y
Miscellaneous Expense Allowance	Y	Y
Mobile Home in Lieu of Household Goods	N	N/A
Property Management	Y	Y
Real Estate Expenses	Y	Y
RIT	Y	N
Temporary Quarters	Y	Y
Transportation of HHG	N	N/A

NOTE: RIT and Home Marketing Incentive payments are not included in the RIT allowance. Taxes are the responsibility of the recipient.

In compliance with existing regulations, the amount of tax liability and the subsequent RIT allowance will be determined by the NSSC. The NSSC will send eligible transferees a request for the RIT voucher submission and necessary information after NASA issues W-2's for the tax year.

An estimate for taxes is calculated for each travel voucher submission as follows:

NASA Pays:

- Withholding Tax Allowance (WTA)

- Employer Portion of Social Security Tax (FICA) (if applicable)
- Employer Portion of Medicare Tax (HIT)

Employee Pays:

- Employee Portion of FICA (if applicable)
- Employee Portion of HIT
- State Tax—(if applicable)
- Local Tax—(if applicable)

NOTE: Employees under the Federal Employees Retirement System (FERS) are subject to FICA. Employees under the Civil Service Retirement System (CSRS) are not subject to FICA. All employees are subject to HIT.

The state tax, local tax, and employee portion of FICA and HIT taxes will reduce the net reimbursement of your travel vouchers.

The total allowable reimbursement will be recorded as part of your gross wages (i.e., the amount after applicable taxes are calculated and added in) when each travel claim is processed. This will result in an increased tax burden for the calendar year; however, the Federal tax has been offset by the WTA payment on the vouchers. Calculation of a RIT is authorized for the year following reimbursements to ensure eligible transferred employees have been compensated for substantially all of the additional Federal, State (if applicable), and local (if applicable) income tax expense incurred.

To Do: Wait for procedures on submission of RIT allowance claim from the NSSC.	
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Loss or Damage Claims

Claims for lost or damaged personal property, resulting from the shipment of household goods while under official transfer of station travel orders, are settled through the Relocation Contractor.

The first step to assuring reimbursement for all lost or damaged goods is to personally monitor all unloading and unpacking. Get a copy of the loading inventory and check off each crate, box, or item. Anything missing or visibly damaged should be noted on the inventory sheet. Annotate on the inventory when the condition is "unknown" for those boxes not unpacked by the carriers or in their presence.

Un-adjudicated or denied claims may receive additional consideration by filing NASA form 1204 "Employee's Claim for Damage to, or Loss of, Personal

Property Incident to Service” only after all contract carrier provisions for remedy have been exhausted. Call the NSSC Customer Contact Center or your Relocation Counselor for assistance.

FINAL COMMENTS

We want you to be satisfied with your move. If there are any problems, or any potential problems that you foresee, please contact your Relocation Counselor or the NSSC as soon as possible. Best of luck at your new duty station!

APPENDICES

APPENDIX A - CHECKLIST OF REQUIRED FORMS

Transferee/NASA Flex

Form Number/Reference	Form Name/Reference	Date Completed
NASA Form 1337	Service Agreement/Duplicate Reimbursement Disclosure Statement - Transferred Employee	
NASA Form 1810	Agreement to Repay Withholding Tax Allowance	
NASA Form 1449C	Information Covering Persons Transferred or Appointed to First Duty Station	
NASA Form 1807	Househunting Trip Binding Decision	
NASA Form 1808	Property Management Binding Decision	
NASA Form 1809	Temporary Quarters Subsistence Expenses (TQSE) Binding Decision	
NASA Form 1450C	Authorization-Change of Official Station (Obtain from the NSSC and ensure it is accurate)	
Standard Form 1038	Advance of Funds Application (if obtaining an advance)	
Standard Form 1012 (Travel Voucher)	Used for Househunting trip reimbursement expenses	
Standard Form 1012 (Travel Voucher)	Used for En route reimbursement expenses	
NASA Form 1500 and Standard Form 1012 (Travel Voucher)	Claim For Temporary Quarters Subsistence Expense Reimbursement to maintain an accurate record (if claiming actual expense method) of your expenses. Actual Expense Method for each 30-day period of Temporary Quarters, submit with Standard Form 1012.	
Standard Form 1012 (Travel Voucher)	Used for Temporary Quarters Lump Sum Reimbursement Method	
NASA Form 1338 and Standard Form 1012 (Travel Voucher)	Employee Application for Reimbursement of Expenses Incurred Upon Sale or Purchase of Residence Upon Change of Official Station.	

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Successful Move (CONUS)**

	Submit with the Standard Form 1012 (These forms should be submitted with the following documentation as applicable: sales agreement, property settlement documents, invoices, receipts for other bills paid, and/or receipts for items paid outside of the contract.)	
Standard Form 1012 (Travel Voucher)	Expenses incurred with unexpired lease transactions	
Standard Form 1012 (Travel Voucher)	Miscellaneous moving expense allowance	
Standard Form 1012 (Travel Voucher)	Reimbursement of expenses or to account for an advance of funds	
Standard Form 1012 (Travel Voucher)	Relocation Income Tax Allowance	
NASA Form 1204 and Standard Form 1012 (Travel Voucher)	Employee's Claim for Damage to, or Loss of, Personal Property Incident to Service. Submit with Standard Form 1012.	
NSSC Form 023	NSSC Travel Receipt Cover Sheet	

NOTE: The forms can be found at: <http://server-mpo.arc.nasa.gov/Services/NEFS/Home.tml>. Also, visit <http://www.nssc.nasa.gov/customerservice/> to see samples of the forms required to complete your travel voucher.

First Duty

Form Number/Reference	Form Name/Reference	Date Completed
NASA Form 420	Service Agreement/Duplicate Reimbursement Disclosure Statement - First Duty Station Appointment	
NASA Form 1449C	Information Covering Persons Transferred or Appointed to First Duty Station	
NASA Form 1450C	Authorization-Change of Official Station (Obtain from the NSSC and ensure it is accurate)	
Standard Form	Advance of Funds Application (if	

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Successful Move (CONUS)**

1038	obtaining an advance)	
Standard Form 1012 (Travel Voucher)	Used for En route reimbursement expenses	
Standard Form 1012 (Travel Voucher)	Reimbursement of expenses or to account for an advance of funds	
NASA Form 1204 and Standard Form 1012 (Travel Voucher)	Employee's Claim for Damage to, or Loss of, Personal Property Incident to Service. Submit with Standard Form 1012.	
NSSC Form 023	NSSC Travel Receipt Cover Sheet	

NOTE: The forms can be found at: <http://server-mpo.arc.nasa.gov/Services/NEFS/Home.tml>. Also, visit <http://www.nssc.nasa.gov/customerservice/> to see samples of the forms required to complete your travel voucher.

Senior Executive Service (SES) Last Move Home

Form Number/Reference	Form Name/Reference	Date Completed
NASA Form 1449C	Information Covering Persons Transferred or Appointed to First Duty Station	
NASA Form 1450C	Authorization-Change of Official Station (Obtain from the NSSC and ensure it is accurate)	
Standard Form 1038	Advance of Funds Application (if obtaining an advance)	
Standard Form 1012 (Travel Voucher)	Used for En route reimbursement expenses	
Standard Form 1012 (Travel Voucher)	Reimbursement of expenses or to account for an advance of funds	
NASA Form 1204 and Standard Form 1012 (Travel Voucher)	Employee's Claim for Damage to, or Loss of, Personal Property Incident to Service. Submit with Standard Form 1012.	
NSSC Form 023	NSSC Travel Receipt Cover Sheet	

NOTE: The forms can be found at: <http://server-mpo.arc.nasa.gov/Services/NEFS/Home.tml>. Also, visit

<http://www.nssc.nasa.gov/customerservice/> to see samples of the forms required to complete your travel voucher.

Temporary Change of Station (TCS)

Form Number/Reference	Form Name/Reference	Date Completed
NASA Form 1813	Temporary Change of Station (TCS) Duplicate Reimbursement Disclosure Statement	
NASA Form 1810	Agreement to Repay Withholding Tax Allowance	
NASA Form 1449C	Information Covering Persons Transferred or Appointed to First Duty Station	
NASA Form 1807	Househunting Trip Binding Decision	
NASA Form 1808	Property Management Binding Decision	
NASA Form 1809	Temporary Quarters Subsistence Expenses (TQSE) Binding Decision	
NASA Form 1450C	Authorization-Change of Official Station (Obtain from the NSSC and ensure it is accurate)	
Standard Form 1038	Advance of Funds Application (if obtaining an advance)	
Standard Form 1012 (Travel Voucher)	Used for Househunting trip reimbursement expenses	
Standard Form 1012 (Travel Voucher)	Used for En route reimbursement expenses	
NASA Form 1500 and Standard Form 1012 (Travel Voucher)	Claim For Temporary Quarters Subsistence Expense Reimbursement to maintain an accurate record (if claiming actual expense method) of your expenses. Actual Expense Method for each 30-day period of Temporary Quarters, submit with Standard Form 1012.	
Standard Form 1012 (Travel Voucher)	Used for Temporary Quarters Lump Sum Reimbursement Method	
Standard Form 1012 (Travel Voucher)	Expenses incurred with unexpired lease transactions	
Standard Form	Miscellaneous moving expense	

**NASA's Guide to a
Successful Move (CONUS)**

1012 (Travel Voucher)	allowance	
Standard Form 1012 (Travel Voucher)	Reimbursement of expenses or to account for an advance of funds	
Standard Form 1012 (Travel Voucher)	Relocation Income Tax Allowance	
NASA Form 1204 and Standard Form 1012 (Travel Voucher)	Employee's Claim for Damage to, or Loss of, Personal Property Incident to Service. Submit with Standard Form 1012.	
NSSC Form 023	NSSC Travel Receipt Cover Sheet	

APPENDIX B –SUMMARY OF ALLOWANCES AND EXCLUSIONS

Below is a summary, in table format, of the allowances and exclusions described in this guidebook. This summary is not all-inclusive.

Allowances

EN ROUTE TRAVEL EXPENSES	REIMBURSEMENT AMOUNTS
Transportation by Common Carrier	Actual expense for employee and immediate family
Transportation by POV	IRS Standard Mileage Rate for moving purposes www.irs.gov
Per Diem	Not to Exceed
Employee or spouse/domestic partner unaccompanied by employee	100% of the Standard CONUS rate; Standard CONUS rate can be located at http://www.gsa.gov/perdiem
Accompanying Spouse	75% of the Standard CONUS rate
Each family member 12 years or older	75% of the Standard CONUS rate
Each family member under 12 years	50% of the Standard CONUS rate
MISC. EXPENSE ALLOWANCE	REIMBURSEMENT AMOUNTS
Employee with immediate family	Without documentation: Flat allowance of \$1300 or 2 weeks' gross pay* (whichever is less) *With documentation: Up to 2 weeks gross pay for itemized actual expenses (maximum rate of grade GS-13)
Employee without family	Without documentation: Flat allowance of \$650 or 1 week's gross pay* (whichever is less) *With documentation: Up to 1 week gross pay for itemized actual expenses (maximum rate of grade GS-13)

**NASA's Guide to a
Successful Move (CONUS)**

LODGINGS-PLUS REIMB. METHOD HOUSEHUNTING TRIP	REIMBURSEMENT AMOUNTS
Maximum Time Allowable	10 days (include travel time)
Transportation Expenses Common Carrier POV	Actual expense for employee and/or spouse only; IRS Standard Mileage Rate for moving purposes
Per Diem	Not to Exceed
Employee and/or spouse traveling separately	Standard CONUS Rate
Employee and spouse, together	Standard CONUS Rate x 1.75
LUMP SUM REIMBURSEMENT HOUSEHUNTING TRIP	REIMBURSEMENT AMOUNTS
Transportation Expenses Common Carrier POV	Actual expense for employee and/or spouse only; IRS Standard Mileage Rate for moving purposes
Per Diem	Not to Exceed
Employee and/or spouse traveling separately	Applicable Locality Rate x 5
Employee and spouse, together	Applicable Locality Rate x 6.25
ACTUAL EXPENSE METHOD TEMPORARY QUARTERS	REIMBURSEMENT AMOUNTS
Maximum Time Allowable	60 days; additional 60 days may be authorized for compelling reasons
Expenses Covered	Lodging, meals, laundry & dry-cleaning
1st 30-Day Period	Not to Exceed
Employee or spouse/domestic partner unaccompanied by employee	100% of the Standard CONUS rate; Standard CONUS rate can be located at http://www.gsa.gov/perdiem
Accompanying Spouse	75% of the Standard CONUS rate
Each family member 12 years or older	75% of the Standard CONUS rate
Each family member under 12 years	50% of the Standard CONUS rate
2nd 30-Day Period	Not to Exceed

**NASA's Guide to a
Successful Move (CONUS)**

Employee or spouse/domestic partner unaccompanied by employee	75% of Standard CONUS Rate; Standard CONUS rate can be located at http://www.gsa.gov/perdiem
Accompanying Spouse	50% of the Standard CONUS rate
Each family member 12 years or older	50% of the Standard CONUS rate
Each family member under 12 years	40% of the Standard CONUS rate
LUMP SUM REIMB. METHOD TEMPORARY QUARTERS	REIMBURSEMENT AMOUNTS
Employee	Gaining Center's Locality Rate x up to 30 days x 75% (no extensions)
Each Accompanying Immediate Family Member	Gaining Center's Locality Rate x up to 30 days x 25% (no extensions)
REAL ESTATE EXPENSES	REIMBURSEMENT AMOUNTS
Time Limit	1 year (extension of 1 additional year, if approved upon request)
Sale	10% of sale price
Purchase	5% of purchase price
Mobile Home (includes boats)	Only if used as a residence
HOUSEHOLD GOODS	REIMBURSEMENT AMOUNTS
Transportation Expenses	According to costs incurred
Maximum Weight Allowance	18,000 pounds for household goods and an additional 2,000 pounds for packing materials (additional 1,500 pounds may be authorized for professional books etc.)
Storage of Household Goods	Not to Exceed
Temporary	60 Days; additional 90 days may be authorized for compelling reasons NOTE: Storage amounts paid over 30 days are taxable and employee pays the taxes.
Extended	Up to 3 years when assigned to isolated duty station within CONUS

Exclusions

The following are examples of those items for which NASA cannot reimburse you. In many cases, the exclusions are the result of General Services Administration (GSA) Federal Travel Regulations (FTR 302). If you have any questions, please contact your Relocation Counselor for assistance.

- Househunting trip transportation and per diem for dependents other than spouse
- More than one househunting trip or a househunting trip taken after the employee reports to new duty station (spouse may still be eligible for a househunting trip - contact your Relocation Counselor for details).
- Househunting trip within 75 miles of old residence
- Moving expenses associated with pets
- Costs of newly acquired items
- Transportation of certain household goods, as specified in Chapter 2 (Transportation of your automobile, which is excluded from the definition of household goods, is not allowed unless it has been determined that it is advantageous to NASA to ship the POV to the new duty station).
- Separate charges for insurance, valuation, and expedited services for moving household goods
- Expenses such as fines, judgments, and court costs that were incurred while making a move
- Costs of repairing or replacing appliances and equipment
- Costs of altering or remodeling residence or other property
- Local transportation costs during temporary quarters
- Various real estate-related expenses as outlined in Chapter 3
- Various miscellaneous moving expenses as outlined in Chapter 3

APPENDIX C - GLOSSARY OF TERMS

Actual expense: Payment of authorized actual expenses incurred, up to the limit prescribed by the Administrator of GSA or agency, as appropriate. Entitlement to reimbursement is contingent upon entitlement to per diem, and is subject to the same definitions and rules governing per diem.

Approved accommodation: Any place of public lodging that is listed on the national master list of approved accommodations. The national master list of all approved accommodations is compiled, periodically updated, and published in the Federal Register by FEMA. Additionally, the approved accommodation list is available on the U.S. Fire Administration's Internet site at <http://www.usfa.fema.gov/hotel/index.htm>.

Authorization: The process of documenting, by means of a travel authorization form (NASA Form 1450C) the travel to be performed and the expenses which will be reimbursed. Generally, all travel must be authorized in advance unless the circumstances of the particular trip are such that it is not feasible to secure advance authorization.

Automated-Teller-Machine (ATM) services: Government contractor-provided ATM services that allow cash withdrawals from participating ATMs to be charged to a Government contractor-issued charge card.

Calendar Day: The 24-hour period beginning at 12:01 am and ending at 12:00 am on the next day.

Commercial Bill of Lading (CBL): A document showing shipment of your goods and acknowledging their receipt, signed by the agent of the carrier, and issued by a carrier or the Government.

Common Carrier: Private-sector supplier of air, rail, or bus transportation.

Commuted Rate: A price rate used to calculate a set amount to be paid to an employee for the transportation and temporary storage of his/her household goods. It includes the cost of line-haul transportation, packing/unpacking, crating/uncrating, drayage incident to transportation and other accessorial charges and costs of temporary storage within applicable weight limit for storage including handling in/out charges and necessary drayage.

Continental United States (CONUS): The 48 contiguous States and the District of Columbia.

Dependent/Immediate Family: Any of the following named members of the employee's household at the time he/she reports for duty at the new permanent duty station or performs other authorized travel involving family members:

- (1) Spouse/Domestic Partner;
- (2) Children of the employee or employee's spouse/domestic partner who are unmarried and under 21 years of age or, who, regardless of age, are physically or mentally incapable of self-support. (The term "children" shall include natural offspring; stepchildren; adopted children; grandchildren, legal minor wards, or other dependent children who are under legal guardianship of the employee or employee's spouse; and an unborn child(ren) born and moved after the employee's effective date of transfer;)
- (3) Dependent parents (including step and legally adoptive parents) of the employee or employee's spouse/domestic partner; and
- (4) Dependent brothers and sisters (including step and legally adoptive brothers and sisters) of the employee or employee's spouse/domestic partner who are unmarried and under 21 years of age or who, regardless of age, are physically or mentally incapable of self-support.

Generally, the individuals named in items 3 and 4 will be considered dependents of the employee if they receive at least 51% of their support from the employee or employee's spouse/domestic partner; however, this percentage of support criteria shall not be the decisive factor in all cases. These individuals may also be considered dependents for the purpose of this definition if they are members of the employee's household and, in addition to their own income, receive support (less than 51%) from the employee or employee's spouse/domestic partner without which they would be unable to maintain a reasonable standard of living.

Effective Date of Transfer or Appointment: The date on which an employee or new appointee physically reports for duty at the new or first official duty station (as opposed to the Payroll/Personnel interpretation as the date the employee enters on the rolls).

Extended Storage: Storage of household goods while an employee is assigned to an official station to which he/she is not authorized to take or unable to use the household goods or is authorized in the public interest. It is also referred to as non-temporary storage.

Government contractor-issued individually billed charge card: A Government contractor-issued charge card used by authorized individuals to pay for official travel and transportation related expenses for which the contractor bills the employee.

Home Marketing Incentive Payment: This program offers you the opportunity to market your home and be rewarded when you bring in a qualified, bona fide buyer. You must use the NASA relocation services contractor in order to qualify for this payment. You will be limited to a total of 60 days of temporary quarters, including any househunting trip days, with no exceptions. The payment is considered taxable income to you and is not included in the relocation income tax allowance.

Household Goods (HHG): Property, unless specifically excluded, associated with the home and all personal effects belonging to an employee and immediate family members on the effective date of the employee's change of official station orders (the day the employee reports for duty at the new official station) that legally may be accepted and transported by a commercial HHG carrier.

(1) HHG also includes:

- (a) Professional books, papers, and equipment (PBP&E);
- (b) Spare parts of a POV (see definition of POV) and a pickup truck tailgate when removed;
- (c) Integral or attached vehicle parts that must be removed due to high vulnerability to pilferage or damage, (e.g., seats, tops, wench, spare tire, portable auxiliary gasoline can(s) and miscellaneous associated hardware);
- (d) Consumable goods for employees assigned to locations where the Department of State has determined that such goods are necessary;
- (e) Vehicles other than POVs (such as motorcycles, mopeds, jet skis, snowmobiles, golf carts, boats that can be transported in the moving van (e.g., canoe, kayak, rowboat, O/I motorboat (14 ft. or less));
- (f) Ultra-light Vehicles (defined in 14 CFR part 103 as being single occupant, for recreation or sport purposes, weighing less than 155 pounds if unpowered or less than 254 pounds if powered, having a fuel capacity NTE 5 gallons, airspeed NTE 55 knots, and power-off stall speed NTE 24 knots.

(2) HHG does not include:

- (a) Personal baggage when carried free on tickets;
 - (b) Automobiles, trucks, vans and similar motor vehicles, mobile homes, camper trailers, and farming vehicles;
 - (c) Live animals including birds, fish, reptiles;
 - (d) Cordwood and building materials;
 - (e) HHG for resale, disposal or commercial use rather than for use by employee and immediate family members;
 - (f) Privately owned live ammunition; and
 - (g) Propane gas tanks.
- (3) Federal, State and local laws or carrier regulations may prohibit commercial shipment of certain articles not included in paragraph (2) of this definition. These articles frequently include:
- (a) Property liable to impregnate or otherwise damage equipment or other property (e.g., hazardous articles including explosives, flammable and corrosive material, poisons);
 - (b) Articles that cannot be taken from the premises without damage to the article or premises;
 - (c) Perishable articles (including frozen foods) articles requiring refrigeration, or perishable plants unless:
 - i. Shipment is to be transported not more than 150 miles and/or delivery accomplished within 24 hours from the time of loading;
 - ii. No storage is required, and
 - iii. No preliminary or en route services (e.g., watering or other preservation method) are required of the carrier.

Househunting Trip: One round trip for an employee and/or employee's spouse to seek a permanent residence at the new duty station in advance of a transfer. Such a trip may not exceed 10 calendar days in duration, including travel time.

Incidental Expenses: See Per Diem Allowance.

Lodging: See Per Diem Allowance.

Lump Sum Reimbursement Method: NASA may offer a lump sum dollar amount for a househunting trip and/or temporary quarters. The employee may accept or decline the offer. If accepted, lodging receipts will be required but itemization is not required for meals and incidental expenses. A voucher must be submitted claiming the allowances in order to be reimbursed.

Meals and Incidental Expenses (M&IE): See Per Diem Allowance.

Mileage Allowance: A rate per mile allowed instead of the actual expenses of operation of a privately owned conveyance or in connection with personally moving your mobile home.

Miscellaneous Moving Expense Allowance: Generally, a specified amount for the purpose of defraying various costs associated with relocating a residence, such as disconnecting and connecting appliances, cutting and fitting rugs, forfeiture losses on medical, dental and food locker contracts that are not transferable, etc.

Mobile Home: Any type of house trailer and mobile dwelling constructed for use as a residence and designed to be moved overland, either by self-propulsion or towing. Also, a boat (houseboat, yacht, sailboat, etc.) when used as the employee's primary residence.

New Duty Station: The NASA Center to which you are relocating to.

Non-temporary Storage: Storage of household goods and personal effects in lieu of transportation in connection with a regular duty assignment at an isolated location in CONUS.

Official Station: The official station of an employee is the location of the employee's permanent work assignment. The geographic limits of the official station are:

- (1) The corporate limits of the city or town where stationed or if not in an incorporated city or town;
- (2) The reservation, station, or other established area (including established subdivisions of large reservations) having definite boundaries where the employee is stationed.

Old Duty Station: The NASA Center or Government Agency to which you are relocating from.

Per Diem Allowance: The per diem allowance (also referred to as subsistence allowance) is a daily payment instead of reimbursement for actual expenses for lodging, meals, and related incidental expenses. The per diem allowance is separate from transportation expenses and other miscellaneous expenses. The per diem allowance covers all charges, including taxes and service charges where applicable for:

- (1) **Lodging.** Includes expenses for overnight sleeping facilities, baths, personal use of the room during the daytime, telephone access fee, and service charges for fans, air conditioners, heaters and fires

furnished in the room when such charges are not included in the room rate. Lodging does not include accommodations on airplanes, trains, buses, or ships. Such cost is included in the transportation cost and is not considered a lodging expense.

(2) **Meals.** Expenses for breakfast, lunch, dinner, and related tips and taxes (specifically excluded are alcoholic beverage and entertainment expenses, and any expenses incurred for other persons).

(3) **Incidental expenses.**

(a) Transportation between places of lodging or business and places where meals are taken, if suitable meals cannot be obtained at the temporary site; and

(b) Mailing cost associated with filing travel vouchers and payment of Government sponsored charge card billings.

Permanent Change of Station (PCS): When an employee transfers from one official station to another whether within the same government agency or between two different government agencies.

Privately Owned Vehicle (POV): Any vehicle such as an automobile, motorcycle, aircraft, or boat operated by an individual that is not owned or leased by a Government agency, and is not commercially leased or rented by an employee under a Government rental agreement for use in connection with official Government business.

Property Management Services: Provided by private companies for a fee, which help an employee to manage his/her residence at the old official station as a rental property. These services typically include, but are not limited to, obtaining a tenant, negotiating the lease, inspecting the property regularly, managing repairs and maintenance, enforcing lease terms, collecting the rent, paying the mortgage and other carrying expenses from rental proceeds and/or funds of the employee, and accounting for the transactions and providing periodic reports to the employee.

Receipt: A written/printed acknowledgement from a vendor to the authorized employee or family for payment(s) received for goods or services provided. The receipt shall provide the following information:

- (1) Printed name and address of the vendor;
- (2) Date payment received;

- (3) Form of payment (specified in the form of cash, check, credit card, etc.);
- (4) Total amount of payment;
- (5) Name of individual who received the goods or services (if hand written);
- (6) Brief description or itemized listing of actual goods or services provided. (Note: If the receipt is for Temporary Quarters/lodging, it should include the address and time period of service.);
- (7) Signature of vendor (if hand written receipt).

Relocation Income Tax (RIT) Allowance: The amount of payment computed and paid in Year 2 to cover substantially all of the estimated additional tax liability incurred as a result of the covered moving expense reimbursements received in Year 1. **This allowance is not available to new appointees.**

Relocation Service Company: A company under contract with NASA to provide relocation services to eligible relocating employees (such as for the shipment and storage of household goods, arranging for purchase of employee's residence, home finding assistance, etc.).

Service Agreement: A written agreement between you and your agency, signed by you, stating that you will remain in the service of the Government for a period of time as specified in FTR 302-2.13 after you have relocated. If you violate a service agreement (other than for reasons beyond your control and which must be accepted by your Agency), you will incur a debt due to the Government, and you must reimburse all costs that your Agency has paid towards your relocation expenses including withholding tax allowance (WTA) and relocation income tax (RIT) allowance.

Standard CONUS Rate: The rate used to compute per diem for a permanent change of station and all other localities not specifically listed in the locality listing.

Temporary Change of Station (TCS): The relocation of an employee to a new official station for a temporary period while the employee is performing a long-term assignment, and subsequent return of the employee to the previous official station upon completion of that assignment.

Temporary Quarters Subsistence Expenses: Expenses incurred by you and your dependents when occupying temporary quarters until you can obtain permanent quarters incident to your transfer to a new duty station. Temporary quarters refers to lodging obtained temporarily after a transfer has been authorized or approved, and after you and/or your dependents vacate the

residence quarters in which you and your dependents were residing at the time of your transfer.

Temporary Storage: Storage of household goods for a limited period of time at origin, destination, or en route in connection with transportation to, from, or between official station or authorized alternate points. It is also referred to as storage in transit (SIT).

Travel Claim (Voucher): A written request, supported by documentation and receipts where applicable, for reimbursement of expenses incurred in the performance of official travel, including relocation travel. NASA employees use Standard Form 1012.

Travel Status: The elapsed period of time from the beginning to the ending of the official travel in compliance with the authority stated on a travel order. This includes incidental waiting time en route for transportation connections and delays en route beyond the control of the traveler.

APPENDIX D - STATEMENT ON VIOLATION OF SERVICE AGREEMENT

In the event an employee violates the terms of a Service Agreement, including failure to affect the transfer, any monies spent by NASA for such travel, transportation, and allowances will be recoverable as a debt due the U.S. Government unless the reason(s) for separation is beyond the control of the employee and is acceptable to the responsible officials of NASA. Violations of the terms of a Service Agreement refer to failure to meet or comply with the specified conditions of the agreement.

Transfers from one duty station to another while serving under a current agreement with NASA is not an agreement violation even though a new assignment may be signed in connection with a transfer. An employee serving under such an agreement at a permanent duty station within the U.S. Government may be released from the conditions of such a service or transportation agreement when the separation was for reasons beyond the employee's control and acceptable to NASA. The determination of acceptability will be made by the Assistant Administrator for Human Capital Management for NASA Headquarters, or by the Director of the NASA Center concerned.

APPENDIX E - A HELPFUL CHECKLIST OF THINGS TO DO

NOTE: This appendix is to assist you in preparing for your move. This is not to be construed to increase or decrease your permanent change of station entitlements in any way.

Phase I

- Verify NASA's relocation policy what it does and does not cover.
- Establish tentative dates for your move.
- Layout your planning calendar schedules.
- Put your home on the market, or notify your landlord of intent to vacate.
- Begin your mover selection process.
- Make a househunting trip to your new location, if authorized. Contact a real estate agent or get an apartment guide if you plan on renting.
- Work with your Relocation Counselor to secure a moving company to handle your relocation.
- Make a list of everyone you need to notify. Update your address book of friends, relatives, and other contacts, including phone numbers.
- Complete an official change of address form at <https://moversguide.usps.com> or at your local post office.
- Begin sorting out those items you do not plan to move. Plan a date for a garage sale.
- Contact the Internal Revenue Service or your accountant for forms and information regarding tax deductible moving expenses.
- Select your new home and arrange financing. Establish tentative closing dates.

- Check with the new school district for school schedules and enrollment requirements.
- Obtain a place of worship information for your new area, if applicable.
- Determine state requirements for new driver's licenses and transfer of registration/license plates.
- Contact an Insurance Agent to arrange for coverage on your new home and automobile.
- Look for job opportunities for your spouse and children, if they plan to work.
- Select a bank, establish accounts, and obtain a safe deposit box.
- Sketch out a floor plan of your new home and get room measurements. Determine how your present furniture, appliances, and decor will fit, and make a list of things you will need to buy.
- Secure a Post Office box for mail forwarding if you still have not found a new home.
- Compile a list of utilities and their phone numbers. Determine any requirements to commence service (such as deposits or prepayments).

Phase II

- Notify schools when you are moving. Arrange for records to be transferred to the new school system.
- Confirm pick-up and delivery dates with your mover or Relocation Counselor. If you need storage, advise the moving company now.
- Continue sorting belongings that you will dispose of, items you are taking with you, and everything else that goes with the mover.
- Obtain an appraisal and gather receipts if you have high value or unusual items that you expect to ship.
- Make your travel arrangements.
- Time to hold your garage sale and/or give to charity any items you no longer need.

- Verify your time schedules with your real estate agents or landlords.
- Reconfirm dates for packing, pick-up, and delivery with your mover or Relocation Counselor.
- Send out change of address cards to the Post Office, friends, relatives, and magazines.
- Gather all your personal records:

Doctors		Dentists		Lawyers
Accountants		Worship Places		Schools

- Contact utilities at your old home concerning disconnect dates, provide a forwarding address, and contact those in your new town to begin service:

	Disconnect Date	Commence Date
Phone company	_____	_____
Gas company	_____	_____
Electric company	_____	_____
Water service	_____	_____
Cable TV	_____	_____
Internet Service Provider	_____	_____

- Notify your credit card companies of the change of address. Apply for new bank cards and local store charge accounts, if necessary.
- Take care of financial arrangements:
 - Transfer bank accounts
 - Contents of safe deposit box
 - Notify your broker or investment counselor
 - Settle any outstanding bills
- Take your pet to the veterinarian for immunization and preparation for the journey. Arrange for transportation and obtain copies of your pet's records and licenses.
- Contact the property manager, and reserve the elevator for moving day if you are moving from or into an apartment or high-rise building.
- Drain the oil and gas from any your power equipment.

- Cancel deliveries and services such as newspapers, diaper service, and trash collection, effective by your moving date.
- Consider a sitter for kids and pets for moving day.

Phase III (Moving Week)

Three or four days before moving out:

- Defrost your freezer. Give or throw away any perishable food you will not eat in the next few days.
- Give your plants to a loving home.
- Have your car serviced if you plan to drive.

One or two days before moving out:

- Pack your luggage and anything you are taking with you.
- Use only those household items you absolutely have to, like towels, sheets, pans, a coffee pot, and a few tools. Everything else should be ready to go.
- Have the moving company pack everything that you are not taking yourself.
- Obtain travelers checks for trip expenses and payment to movers.

Moving Day (Relax and observe the moving professionals at work.)

- Return any leased equipment for television, telephone, etc.
- Before the movers leave, check through the house with your driver to make sure nothing has been missed. Remember to check the attic, basement, closets, cupboards, drawers, and outdoor buildings.

After Arrival at New Location

- Ensure tax elections (including state of residency) are reviewed and updated as applicable to your relocation
- Submit voucher for en route travel

APPENDIX F – REIMBURSABLE AND NON-REIMBURSABLE RESIDENTIAL TRANSACTIONS

Subpart C—Reimbursable Expenses

§302-11.200 What residence transaction expenses will my agency pay?

Provided the residence transaction expenses are customarily charged to the seller of a residence in the locality of the old official station or paid by the purchaser at the new official station, your agency will, with appropriate supporting documentation provided by you, reimburse you for the following residence transaction expenses when they are incurred by you incident to your relocation:

(a) Your broker's fee or real estate commission that you pay in the sale of your residence at the last official station, not to exceed the rates that are generally charged in the locality of your old official station;

(b) The customary cost for an appraisal;

(c) The costs of newspaper, bulletin board, multiple-listing services, and other advertising for sale of the residence at your old official station that is not included in the broker's fee or the real estate agent's commission;

(d) The cost of a title insurance policy, costs of preparing conveyances, other instruments, and contracts and related notary fees and recording fees; cost of making surveys, preparing drawings or plats when required for legal or financing purposes; and similar expenses incurred for selling your residence to the extent such costs:

(1) Have not been included in other residence transaction fees (i.e., brokers' fees or real estate agent fees);

(2) Do not exceed the charges, for such expenses that are normally charged in the locality of your residence;

(3) Are usually furnished by the seller;

(e) The costs of searching title, preparing abstracts, and the legal fees for a title opinion to the extent such costs:

(1) Have not been included in other related transaction costs (i.e., broker's fees or real estate agency fees); and

(2) Do not exceed the charges, for such expenses, that are customarily charged in the locality of your residence.

(f) The following "other" miscellaneous expenses in connection with the sale and/or purchase of your residence, provided they are normally paid by the seller or the purchaser in the locality of the residence, to the extent that they do not exceed specifically stated limitations, or if not specifically stated, the amounts customarily paid in the locality of the residence:

- (1) FHA or VA fees for the loan application;
- (2) Loan origination fees and similar charges such as loan assumption fees, loan transfer fees or other similar charges not to exceed 1 percent of the loan amount without itemization of the lender's administrative charges (unless requirements in §302-11.201 are met), if the charges are assessed in lieu of a loan origination fee and reflects charges for services similar to those covered by a loan origination fee;
- (3) Cost of preparing credit reports;
- (4) Mortgage and transfer taxes;
- (5) State revenue stamps;
- (6) Other fees and charges similar in nature to those listed in paragraphs (f)(1) through (f)(5) of this section, unless specifically prohibited in §302-11.202;
- (7) Charge for prepayment of a mortgage or other security instrument in connection with the sale of the residence at the old official station to the extent the terms in the mortgage or other security instrument provide for this charge. This prepayment penalty is also reimbursable when the mortgage or other security instrument does not specifically provide for prepayment, provided this penalty is customarily charged by the lender, but in that case the reimbursement may not exceed 3 months' interest on the loan balance;
- (8) Mortgage title insurance policy, paid by you, on a residence you purchased for the protection of, and required by, the lender;
- (9) Owner's title insurance policy, provided it is a prerequisite to financing or the transfer of the property; or if the cost of the owner's title insurance policy is inseparable from the cost of other insurance which is a prerequisite;
- (10) Expenses in connection with construction of a residence, which are comparable to expenses that are reimbursable in connection with the purchase of an existing residence;
- (11) Expenses in connection with environmental testing and property inspection fees when required by Federal, State, or local law; or by the lender as a precondition to sale or purchase; and
- (12) Other expenses of sale and purchase made for required services that are customarily paid by the seller of a residence at the old official station or if customarily paid by the purchaser of a residence at the new official station.

§302-11.201 When may my reimbursement for loan assumption fees or other similar fees exceed the 1 percent as specified in §302-11.200(f) (2)?

Reimbursement may exceed 1 percent (as specified in §302-11.200(f) (2) only when you provide evidence that the higher rate:

- (a) Does not include prepaid interest, points, or a mortgage discount; and
- (b) Is customarily charged in the locality where the residence is located.

§302-11.202 What residence transaction expenses will my agency not pay?

Your agency will not pay:

(a) Any fees that have been inflated or are higher than normally imposed for similar services in the locality;

(b) Broker fees or commissions paid in connection with the purchase of a home at the new official station;

(c) Owner's title insurance policy, "record title" insurance policy, mortgage insurance or insurance against loss or damage of property and optional insurance paid for by you in connection with the purchase of a residence for your protection;

(d) Interest on loans, points, and mortgage discounts;

(e) Property taxes;

(f) Operating or maintenance costs;

(g) Any fee, cost, charge, or expense determined to be part of the finance charge under the Truth in Lending Act, Title I, Pub. L. 90-321, as amended, and Regulation Z issued by the Board of Governors of the Federal Reserve System (12 CFR part 226), unless specifically authorized in §302-11.200;

(h) Expenses that result from construction of a residence, except as provided in §302-11.200(f) (10); and

(i) Losses, see §302-11.304.

APPENDIX G - HOME MARKETING INCENTIVE PROGRAM

As part of the NASA Home Sale Program you may wish to take advantage of the NASA Home Marketing Incentive Program. This program offers you the opportunity to market your home and be rewarded when you bring in a qualified, bona fide buyer. Because the fees paid to NASA's relocation services contractor are significantly less when you aggressively market your home and secure an outside contract, NASA has implemented a program wherein the savings are shared with you.

Please read the details carefully as you will need to make some immediate, binding decisions if you choose to participate.

Award Payments

The amount of the award will be based on the amended sale price. You will not be required to file a voucher for this payment. The payment will be generated based upon notification by the NASA relocation contractor that an amended sale has settled. To receive payment of the award, the sale which you negotiated has to actually close. If, for whatever reason, it does not settle and the property reverts to the relocation company as regular inventory, the award will not be granted.

Employees electing to participate in the Home Marketing Incentive Program will be limited to a total of 60 days of temporary quarters, with no exceptions.

Additional Information

Please work closely with your Relocation Counselor who will guide you through the amended sale process.

If you have not yet entered the Home Sale Program but would like to speak to someone about this program, please call NSSC Customer Contact Center at 1-877-677-2123 for referral information.

Benefits

You can receive an award equal to 3% of the *amended value* of the home not to exceed \$15,000. The following chart outlines some sample situations and the possible benefit to you:

Appraised Price	Actual Sale Price	Incentive Payment <i>(based on 3%)</i>	Amount Paid to Employee <i>(taxes not reflected)</i>
\$100,000	\$102,000	\$3,060	\$105,060
\$100,000	\$ 98,000	\$2,940	\$100,940
\$150,000	\$153,000	\$4,590	\$157,590
\$150,000	\$148,000	\$4,440	\$152,440
\$200,000	\$204,000	\$6,120	\$210,120
\$200,000	\$198,000	\$5,940	\$203,940

Eligibility

To be eligible for this program you must use the NASA relocation contractor to purchase your home at the old duty station. If you opt for direct reimbursement of your real estate expenses, you are not eligible for this program.

NASA requires the employee market their home through a preferred agent/broker for 75 calendar days prior to accepting an appraised value sale. Employees who choose not to use a preferred agent/broker are ineligible for any home marketing incentives provided by the agency.

Once you enter the program, you are required to continue the listing for the entire 75 days. This decision is binding and withdrawal from the program is not permitted.

In addition, employees who participate in the Guaranteed Home Sale program must agree to market their home at a price which does not exceed 5% of:

- A current market analysis as provided by any licensed agent/broker, **or**
- The current appraised value of the home, as provided by the contractor's licensed agent/broker

Tax Consequences

The Home Marketing Incentive is considered taxable income to you; therefore, income and employment taxes will be withheld. You will not receive a withholding tax allowance to offset the withholding on the incentive payment, nor a relocation income tax allowance payment for any of the federal, state and local income taxes on the incentive payment.

APPENDIX H - NASA RELOCATION HIGHLIGHTS

NASA has contracted to provide you with a comprehensive program to assist you with all phases of your relocation. You will be contacted by a Relocation Counselor to walk you through the various steps. The following is a synopsis of the many features of the program. Your Relocation Counselor will help you with the details of each phase of your move.

Pre-Transfer Counseling

Pre-transfer counseling includes advance information on the services provided by the NASA Relocation Contractor. If you would like to speak to someone about relocation services call please call NSSC Customer Contact Center at 1-877-677-2123 for referral information.

Destination Services

The Relocation Counselor offers professional guidance on making an informed decision in your new location. In addition, a local real estate agent can provide you with information on housing availability and costs, schools, taxes and the community. Experts will help you plan your househunting trip, assign a local real estate agent(s) and monitor your househunting trip to ensure that you make the best use of your time.

Departure Area Services – Home Sale Assistance

Eligibility: In order to participate in the home purchase program, you must:

- Legally own the property as defined in the Federal Travel Regulations.
- Commute to and from the property, making this your official residence.

In addition, the property must meet certain eligibility criteria. It must be a completely constructed property that complies with all local, state and federal building, fire, health, and safety requirements. The following properties are *not* eligible:

- Homes that are not insurable
- Mobile/manufactured homes, cooperatives, boats and houseboats
- Contaminated properties (lead paint, asbestos, leaking underground storage tanks, properties near hazardous waste sites, etc.)
- Homes where financing cannot be obtained

In addition, there are situations where NASA may only pay a pro-rata (partial) share of the NASA relocation contractor fee. In the following instances, you

would be responsible for the payment of the unpaid portion of the fee. This would include:

- Situations where the home is in title with a non-family member
- Ownership of a duplex or multi-family dwelling that is only partially occupied by you
- Ownership of a property with land in excess of that which is reasonable for the area
- Homes with a value in excess of \$500,000

Marketing Assistance

This program is designed to help you maximize the value you can expect for your home. The appraisal process will give you a guarantee from the NASA relocation contractor, which may or may not be the eventual selling price of your property. Only the open market will determine the “worth” of your home. Your Relocation Counselor will work with you to develop a strategy to market your home. They will work with you to select an effective real estate agent, to list your home at a price that will generate interest from the buyers in your area, and then to negotiate the best possible price for your home.

Listing Your Home

It is imperative that you include the following exclusion clause in any listing agreement that you sign:

The Owners hereby reserve the right:

1. *To sell, transfer or otherwise convey the property to the NASA relocation contractor at any time, and in such event, the agreement is canceled with no obligation of commission or continuance of the listing thereafter: and*
2. *No commission or compensation shall be earned by, or due payable to, broker until the sale of the property has been consummated between the seller and buyer, the deed delivered to the buyer and the purchase price delivered to the seller.*

The Appraisal Process

Your Relocation Counselor will order two appraisals of your current residence. He/she will provide you with a list of local, qualified, independent fee appraisers. You may select two from this list or you may suggest alternative appraisers not on the list. If you select alternative appraisers, they must meet the following standards:

Derive his/her income primarily from residential appraising (not commercial appraising or as a real estate agent/broker)

- Be familiar with market conditions in the area where your home is located
- Have knowledge and experience using the Employee Relocation Council Appraisal form
- Be available to complete the assignment in an accurate and timely manner so that the NASA relocation contractor can present an offer to you within 30 days
- Have access to current local market data through a multiple list service or other cooperative service
- Have no present or future interest in your home, nor have a relationship that would affect an independent judgment on the value
- Not be a government employee, or related to you, or a NASA relocation contractor employee
- Not have appraised your home within the past six months

The appraisers will be asked to evaluate your home based on the market value approach. They are asked to consider current sales of similar homes in your area and estimate the most probable price your home might sell for under current market conditions in your community. This does not mean the highest or the lowest price. The appraisers will consider the value of your home in "as is" condition. Since the appraisers are not qualified to judge the condition of roofs, water heaters, furnaces, etc., they assume that everything is in working condition.

***Take an Active Role in the Appraisal Process.* Give all appraisers a list of comparable homes that have recently sold, closed, and those which are currently on the market. The appraisers must consider this information when determining the value of your property. If not, they must provide an explanation as to why it was not included in their written report.**

Once the NASA relocation contractor receives the written appraisal reports, they are reviewed for consistency of information. If the values are within 5% of the higher appraisal, the two appraisal values are averaged and you are called with a guaranteed offer. If the difference of opinion is more than 5%, a third appraisal is ordered. When all three reports are in, the two closest are averaged and that is the guaranteed offer you will receive. If all three vary equally, all three are averaged.

Your Relocation Counselor will make the offer to you by phone and follow up with a written offer. The written offer will include copies of the appraisals and any inspections that might have been ordered. You will have 60 calendar days to continue to market your home for an amended sale or accept/reject the offer.

Equity Advance

To enable you to market your home for as long as possible and to take advantage of the home selling incentive, you can ask for a no-interest equity advance for up to 95% of your equity off of the guaranteed offer. You will simply need to demonstrate to your Relocation Counselor that you need the funds for the purchase of a home in your new location.

The Amended Sale

If you receive an offer from an independent source, you should immediately notify your Relocation Counselor. **DO NOT SIGN ANY CONTRACTS, COUNTER-OFFERS OR CONTRACT ADDENDUMS.** If you do sign any document with a buyer, you will no longer be able to participate in the NASA Guaranteed Home Sale Program. In addition, you will no longer qualify for the NASA Home Sale Marketing Incentive Program (*see below*). Your Relocation Counselor will review your offer to determine if it is a bona fide offer (all contingencies have been met) and instruct you on how to proceed. The Relocation Counselor will speak with your real estate agent to ensure his/her cooperation with the process. You will be asked to amend the NASA relocation contractor's contracts of sale to the new higher, amended price. If your appraisals are not complete, you can still take advantage of this part of the program. The NASA relocation contractor will simply send you a contract of sale at the amended value sale price. There will be no appraised price. The NASA relocation contractor will then purchase the property from you for this amount. At the same time, the agent will be instructed to send the buyer's contract to the NASA relocation contractor for signature. This process ensures that you will receive the higher price that you have access to your equity that you are protected in case the transaction does not go to settlement and that your real estate agent receives the earned commission. In addition, it makes you eligible for the NASA Home Sale Marketing Incentive Program.

The NASA Home Sale Marketing Incentive Program

Because NASA's fees to the NASA relocation contractor are significantly less (if you are able to generate an outside offer instead of accepting the appraised price), NASA has implemented this program to share the benefit of the savings with you. You must commit to marketing your home within set guidelines. After the home closes between the NASA relocation contractor and the outside buyer, you will receive 3% of the amended value of your home not to exceed \$15,000. Your Relocation Counselor will review the details of the program with you.

Final Highlight

Once you have sold your home to the NASA relocation contractor (either at the appraised price or as an amended sale), you have 45 days to vacate your property. The property must be left in broom-clean condition.

You and your family will have many questions about the relocation process. Our goal for the NASA relocation contractor is to relocate you to your new location as efficiently and cost effectively as possible. Their Relocation Counselors are versed in all the details of the NASA program. This guide is designed as a quick reference. Your Relocation Counselor will work through all the details with you. Please call whenever you have a question or concern.

APPENDIX I

Calls/Emails from NSSC	
NSSC-COS Travel	Sends email once proper paperwork is received from the Center to begin your move. This email will include your Travel Authorization (TA) Number. Please note: If you have not gotten this email and feel you should have, please contact your POC at the Center you have been negotiating with to ensure paperwork is on its way to the NSSC.
NSSC-COS Travel	Sends email with approved NASA Form 1450C once approved and funded.

Calls/Emails from Relocation Contractor	
Non Home Sale Portion	
Associate Relocation Counselor (ARC)	Makes initial contact to set up initiation call.
Relocation Counselor (RC)	Counsels on entitlements, assist with completion and submissions of forms, and facilitates household goods. Also, serves as main contractor for non-home sale activities.
Move Specialist	Facilitates and coordinates the household goods move including setting move dates, arranging survey, and third party services.
Van Line Coordinator	Makes contact to schedule and confirm a survey of the employee's household goods.
Third Party Contacts	If special crating is required, a pool table needs to be broken down and moved, or additional services are required, the employee may receive a call from the representative to arrange.
Van Coordinator/Driver	The driver for the employees household goods move may contact the employee to confirm arrival times.
Mortgage Providers	If the employee agrees for the Relocation Contractor to provide a mortgage referral, the employee will be contacted by a representative from the requested lender.
Home Sale Portion - (If authorized for the Guaranteed Home Sale Program)	
Relocation Counselor (RC)	Facilitates and serves as the main contact for the entire home sale process.
Title Specialist	Title will be ordered on the employee's home and may hear from the title specialist regarding obtaining deed documents and title paperwork.
Appraisers	2 Appraisers will contact the employee to arrange the appraisal appointments.
Inspectors	Inspectors will contact the employee directly to schedule appointments unless another point of contact has been established by the employee.

How to Voucher for Expenses	
NSSC website	https://www.nssc.nasa.gov/portal/site/customerservice/menuitem.c3dba0acf0b0931c33e9a1104dd72749/
Questions on vouchering or reimbursement	Call the NSSC at 877-677-2123