Relocation Policy – Bargaining Employees

Reference #

TBD

Document Category

Policy

Content

Contains policy that applies to relocation and its associated expenses.

Owner

Executive Director, Compensation and Benefits

Executive Leadership Team (ELT) Sponsor

Chief Human Resources Officer

Issue Date

July 2026

Summary of Major Changes

This policy and its supporting materials supersede the January 2016 edition of Handbook F-15-C, Relocation Policy – Bargaining Employees.

Summary of Major Changes:

Streamlined approval authority and roles and responsibilities.

- Updated to reflect use of the relocation management firm online expense reporting system for managing relocation activities and expenses.
- Streamlined information for home sale, home buying, and relocation activities in chronological order.
- Provided clarity on the policy for mileage requirements when relocating.

Availability

This document is available for Postal Service employees at http://blue.usps.gov. Copies are available to the public via the Postal Bulletin.

Questions

Address questions about this policy to the Owner.

Contents

1 Purpose

This policy provides relocation directives for the United States Postal Service (USPS) and United States Postal Inspection Service (USPIS). Title 39, United States Code (U.S.C.), Section 410, gives the Postal Service the authority to establish such policy.

This policy outlines expenses and actions allowed for relocation.

2 Scope

This policy is intended for bargaining employees and employees who hold equivalent grade positions in the USPIS and claim relocation benefits to physically move to a new principal residence. It is also intended for individuals managing relocation logistics and expenses on behalf of the Postal Service.

Information pertaining to travel for all employees is contained in F-15 Travel Policy and F-15 Travel Procedure. Relocation policy and procedure for USPS nonbargaining Executive and Administrative Schedule (EAS), Management and Technical Pay Band (MTP), Attorney Compensation Systems (ACS) employees, and equivalent positions within USPIS and OIG, is contained in F-15-A Relocation Policy and F-15-A Relocation Procedure. Relocation policy for Postal Career Executive Service (PCES) I and II Employees, and equivalent positions within USPIS and OIG, is contained in F-15-B Relocation Policy and F-15-B Relocation Procedure.

2.1 Deviations

Deviations from this policy will only be considered under extreme circumstances. This policy does not uniformly cover all relocation-related expenses or remove all the inconveniences that might be involved in relocation. The employees must weigh the professional and personal options involved in relocation.

3 Roles and Responsibilities

Each individual must review this policy carefully to become familiar with relocation benefits and responsibilities. Each itinerary must be planned to accomplish the relocation with minimal time and expense.

Role	Responsibility
Vice Presidents	▪ Submit transferee requests for deviations from policy and waivers of repayment to the Executive Director, Compensation and Benefits with their concurrence.
Postal Career Executive Service Hiring Official	▪ Authorize relocation benefits for bargaining employees.
Executive Director, Compensation and Benefits	▪ Review requests for deviations from policy and waivers of repayment and provide approval decisions.
Headquarters, Travel and Relocation	▪ Oversee relocation activities, benefits and expenses, and establish relocation policy.

Role	Responsibility
	▪ Provide review and verification of relocation authorization and benefits eligibility and provide final approval of relocation authorizations.
Relocation Management Firm (Relocation Consultant)	▪ Provide guidance to transferring employees on Postal Service relocation policy and processes. ▪ Ensure prompt payment of reimbursable expenses. ▪ Assist with arrangements for moving, storing, and delivery of household goods.
Transferring Employee	▪ Coordinate travel schedules with and obtain approval from officials at both the old and new duty stations.

4 Eligibility

Bargaining employees are eligible for benefits in cases of directed reassignment. Refer to Appendix A: Benefits.

To receive relocation benefits for a transfer from one duty station to another for permanent duty, regardless of the reason for transfer, the following is required:

a. The relocation is in the best interests of the Postal Service.

b. The distance from the current residence to the new duty station must exceed the distance from the current residence to the current duty station by at least 50 miles. This is known as the "50-Mile Rule". If the distance difference is between 50 and 100 miles, the employee must move at least half that distance closer to the new duty station.

c. The employee must report to and remain at the newly assigned duty station for a period of 1 year following their report-to-work date.

d. The employee must sign the Relocation Agreement. By accepting the Relocation Agreement, the employee is agreeing to:

   i. Have read and understood the F-15-C Relocation Policy and Procedures.

   ii. Physically move to the new duty station community.

   iii. Have an understanding of their liability to repay a prorated portion of all benefits paid to them, and on their behalf, should they not complete the 1-year commitment in the new duty station, and/or if they separate from the Postal Service for any reason prior to completing the 1-year commitment.

If an employee misrepresents the need for relocation benefits, the employee will be required to repay the Postal Service for the received benefits. An employee who declines a transfer after receiving relocation funds from the relocation management firm (RMF) or incurring a relocation-related expense paid by the Postal Service must repay all relocation funds and reimbursements received, including all tax assistance.

4.1 Time Limit for Completing Relocation

An employee must complete the move within 1 year from the report-to-work date provided on the relocation authorization form. All allowable travel and residence transactions must be completed and reimbursed to the employee within 1 year of the reporting date to the new duty station. The period for completing relocation may be extended for any time spent in active duty military service.

An employee reporting for duty outside the continental United States (OCONUS) may have the relocation period extended if time is lost due to shipping restrictions.

4.2 Immediate Family Members

Immediate family members eligible for relocation benefits must be: (1) part of the employee's household at the time the employee is notified of a transfer or reassignment; and (2) moving with the employee. Immediate family members include an employee's:

a. Legal spouse. A fiancé is not eligible for benefits. If the marriage occurs during the relocation process, the spouse may be eligible for certain relocation activities that occur after the date of marriage. Spouses of common law are eligible when:

   i. The state they are moving from recognizes common law marriage; and

   ii. Verification can be provided that all the requisite requirements of that state for recognizing such a common law marriage have been met.

b. Children, including natural offspring, stepchildren, adopted children, grandchildren, legal minor wards, or other immediate family member children who are under the legal guardianship of the employee and/or their spouse. Each of these children must meet one of the following criteria:

   i. Unmarried and under 21 years of age.

   ii. Physically or mentally incapable of supporting themselves, regardless of age.

   iii. An unmarried full-time student under 23 years of age.

c. Immediate family members, parents of the employee or the spouse's parents who receive at least 51 percent of their support from the employee or their spouse.

4.3 Eligibility of Spouse Employed by the Postal Service

If an employee and their spouse are employed by the Postal Service and both are relocating to the same area, only one employee will receive full relocation benefits. A spouse employed by the Postal Service is eligible for partial benefits as a family member if they are moving with the employee but is not eligible for full relocation benefits.

The spouse can receive advance round trip travel and en route travel time if the employee's relocation authorization includes these benefits. The spouse is eligible to use Relocation Leave. The spouse must use these travel benefits within the employee's relocation time period.

5 Approval Authority

Hiring officials, known as approving officials, are authorized to approve relocation benefits.

An approving official is authorized to delegate authority to someone acting in their place when they are absent or to someone else who is acting in a vacant approving official position. A designee may complete and submit the relocation authorization form; however, the approving official named on the form must be the appropriate PCES hiring official. Approving officials assigning a permanent designee with the responsibility of initiating relocations must provide written notice to Headquarters, Travel and Relocation.

The approving official must submit relocation authorizations at least 30 calendar days before a transferring employee's report-to-work date.

6 Relocation Management

All relocation activities, benefits, and associated expenses must be approved by the appropriate approval authority.

The transferring employee must not participate in any relocation activities prior to being authorized to do so. The transfer must be approved by Headquarters, Travel and Relocation, and the employee must receive their initial counseling session with the RMF before using any relocation benefits. Benefits are not provided after the fact, and an employee who incurs expenses prior to authorization and counseling will nullify these benefits by doing so.

6.1 Relocation Management Firm

The Postal Service has a contractual arrangement with a specific RMF to provide relocation and authorized benefit information to employees. All relocation arrangements must be made through the RMF. Any eligible transferring employee must utilize the RMF online expense reporting system for relocation reimbursements.

The Postal Service reserves the right to reduce what it determines to be excessive expenses.

6.1.1 Relocation Management Firm Real Estate Brokers and Agents

To receive reimbursement for real estate transactions, an employee must work with the RMF network of brokers and agents. An employee who decides to use an outside broker must ensure the broker agrees to pay any referral fees entitled to the RMF.

6.2 Detail Assignment

An employee on detail assignment that becomes their permanent position must relocate according to this relocation policy. Regular travel benefits for detailed employees end on the same day as the effective date of their new permanent position. The employee must return to their permanent duty station to make arrangements for the relocation move. If the employee does not return home, relocation benefits are modified to exclude advance round trip travel expenses.

Relocation cannot be delayed by a detail assignment.

6.3 Individually Billed Travel Card

If a bargaining employee has an Individually Billed Travel Card, it may be used to make travel arrangements related to relocation activities for an employee and authorized family members. The employee must make these arrangements as if traveling for official Postal Service business, in accordance with F-15 Travel Policy and Procedures. The employee may use an Individually Billed Travel Card to pay for temporary quarters while waiting to occupy a permanent residence at the new duty station. Expenses charged to the Individually Billed Travel Card must be paid by the employee directly to the card provider, using the funds provided by the RMF.

An Individually Billed Travel Card must not be used for non-travel-related relocation expenses, such as:

a. Residence transactions.

b. Deposits that will be returned to the employee.

c. Shipment of household goods.

6.4 Retreat Rights

An employee eligible to exercise retreat rights to return to the old duty station is not required to repay the costs of relocation. Relocation benefits are not provided for the move back to the old duty station.

7 Relocation Benefits

Time limits for relocation benefits are based on the report-to-work date, not the effective date stated on PS Form 50, *Notification of Personnel Action.* All benefits must be authorized by the approving official.

7.1 Home Sale

The Postal Service will reimburse the employee for allowable expenses incurred in connection with selling the old residence at the old duty station. The amount of this reimbursement cannot be more than 10 percent of the actual sales price, based on a maximum home price of $800,000, with a reimbursement limit of $80,000, and includes:

a. The cost of advertising (newspaper, bulletin board, multiple-listing services, or other advertising) to sell the old residence at the old duty station if the employee has not paid for those services as part of a real estate commission; and

b. Real estate commission that was paid for selling the residence, if the commission does not exceed customary rates for that locality.

7.1.1 Direct Reimbursement Program

The Direct Reimbursement Program allows an employee to sell their home without inspections, other than those required by any potential buyer. The employee must list the home with an RMF network broker or agent to be eligible for reimbursement of closing costs.

After the sale is closed, the employee must submit a request for reimbursement through the RMF online expense reporting system.

Using the Direct Reimbursement Program leads to taxable income for the employee and additional costs for the Postal Service.

7.1.2 Loss-on-Sale

Loss-on-sale reimbursement is available to employees participating in the home sale programs. External hires, including those from another government agency, are not eligible for this loss-on-sale reimbursement. To be considered for loss-on-sale reimbursement, the loss must meet all the following conditions:

a. The loss must be a direct result of market conditions defined as slow, declining, or oversupplied in the area of the home at the time of sale.

b. The sale price of the residence must not be the result of, or must not be affected by, the lack of care or deferred maintenance, existing or preexisting, on the part of the employee owning the home.

c. The sale price of the home must not be the result of a negotiated solution, known as a short sale, or foreclosure. Additionally, the sale price must not have been significantly reduced for purposes of a quick sale or fire sale in order to gain a buyer.

d. The employee did not decline a legitimate offer from an outside buyer, to reduce the sales price in accordance with real estate agent recommendations, or to accept a purchase offer made by the RMF.

Determination of the loss is at the sole discretion of the Postal Service. The Postal Service has given the RMF authority to review and assess loss-on-sale requests and issue payments when eligibility, documentation, and requisite requirements are met. The RMF has discretion to deny these requests when appropriate.

When a home is sold through the short sale process, or the home has fallen into foreclosure, the employee is not eligible for the loss-on-sale benefit.

The maximum loss amount allowed for loss-on-sale reimbursement is $100,000. Reimbursement limits are as follows:

Loss-on-Sale	Reimbursement
From $1 to $20,000	90 percent
From $20,001 to $40,000	75 percent
From $40,001 to $60,000	50 percent
From $60,001 to $75,000	25 percent
From $75,001 to $100,000	10 percent

The maximum equity loss reimbursement is $49,250, without taxes.

7.1.3 Relocation Management Firm Real Estate Brokers and Agents

For the employee to protect themselves against a real estate commission claim, the employee must ensure that their listing agent includes a broker exclusion clause in the listing agreement before executing. If a broker refuses to include this clause in the listing agreement, the employee must not sign the listing agreement, and must contact the RMF consultant. When working with the RMF real estate brokers and agents, the employee must manage and maintain the home until it is sold.

7.1.4 Marketing Assistance

Marketing assistance is provided to bargaining employees who are eligible for the Direct Reimbursement Program.

7.2 Constructing a House

The Postal Service, at its discretion, may reimburse expenses comparable to the expenses that would be reimbursable for buying an existing house, for the construction of a new house.

The requirement to use an RMF network broker applies to new construction home purchase. Generally, brokers are not used for such transactions, but the RMF will appoint one to represent the employee at closing with the builder.

The purchase of land only is not a reimbursable expense.

7.3 Home Buying

The Postal Service will reimburse an employee for allowable expenses incurred in connection with buying a residence at the new duty station. The amount of this reimbursement cannot be more than 5 percent of the purchase price based on a maximum home price of $800,000, up to a reimbursement limit of $40,000.

7.3.1 Mortgage Counseling

A bargaining employee eligible to participate in the home buying program is eligible to receive mortgage counseling assistance through the RMF. The employee may find their own mortgage lender for purchasing a new home or may receive assistance through the RMF.

7.3.2 Real Estate Commissions

The Postal Service will not reimburse a real estate commission or broker's fee when an employee buys a new home at a new duty station unless it is deemed a mandatory buyer fee. The employee must contact the RMF consultant before signing any agreement to pay the destination agent commission. The employee must also deduct any compensation they or immediate family receive for performing brokerage or real estate services from the amount that the employee claims for reimbursement.

7.4 Closing Costs

The Postal Service may reimburse certain costs of selling a home in the area of the old duty station or buying a home in the area of the new duty station if they meet all of the following conditions:

a. The closing and selling costs must not have been included in expenses claimed elsewhere.

b. The selling closing costs must be those customarily paid by the seller, and the buying closing costs must be those customarily paid by the buyer.

c. The closing and selling costs must not be more than the amounts customarily charged in the locality of the residence bought or the residence sold.

d. The closing and selling costs must appear on the Closing Disclosure/Settlement Statement.

Costs associated with selling a home in the area of the old duty station are included in the maximum reimbursement of up to 10 percent of the selling price, up to a maximum of $80,000. Some costs, however, are not reimbursed. Refer to Appendix B: Closing Disclosure/Settlement Statement Reference List – Old Duty Station.

Costs associated with the purchase of a home at a new duty station are included in the maximum reimbursement of up to 5 percent of the purchase price, up to a maximum of $40,000. Refer to Appendix C: Closing Disclosure/Settlement Statement Reference List – New Duty Station.

7.5 Expenses for Breaking a Lease

Certain expenses incurred for breaking a lease (including month-to-month rental) on residence quarters the employee occupied at the old duty station may be reimbursable. These expenses may include the broker's fees for obtaining a sublease or the cost of advertising an unexpired lease. Expenses may be eligible for reimbursement, with a maximum amount equal to 6 months' rent, if all the following conditions are met:

a. The employee did not contribute to the cost by failing to give prompt and appropriate notice of lease termination.

b. The applicable laws or the terms of the lease provide for payment of breaking the lease.

c. The costs cannot be avoided by subleasing or other arrangements.

d. The broker's fees or advertising charges do not exceed those typically charged for comparable services in that locality and expenses are itemized with the total amount provided on an expense report.

If the employee shares the lease with a non-family member, the lease break reimbursement will be prorated to reflect only the employee's portion.

7.6 Allowable Expenses

7.6.1 Lump Sum Allowance

An authorized employee may receive a calculated lump sum allowance intended to assist in offsetting expenses related to:

a. Finding a home (advance round trip allowance for one trip) at the new duty station location.

b. Obtaining commercial lodging for 30 calendar days (temporary quarters allowance) at the new duty station location.

The authorization of a lump sum allowance depends on factors such as:

a. The distance between the old residence and the new duty station.

b. The transportation mode.

c. Whether the employee had a prolonged detail at the new duty station.

d. Whether the employee owns or leases a residence at the new duty station that will become their principal residence.

An employee who owns or leases a home at the new duty station at the time they are authorized for relocation benefits, and will use it as their primary residence, does not qualify for advance round trip or temporary quarters allowances. Consequently, they will be ineligible for a lump sum payment.

7.6.1.1 Advance Round Trip

Advance round trip travel time to the new duty station is provided so the employee can find a new residence within the area of their new duty station. The approving official can authorize one trip of no more than 10 calendar days (including travel time and holidays/scheduled days off). When relocation authorization forms are received by Headquarters Travel and Relocation, the advance round trip will not be provided if the report-to-work date has passed or if there are not 10 calendar days between the date of receipt and the report-to-work date.

When circumstances warrant, the Postal Service reserves the right to consider the distances between the old and new duty stations and the mode of transportation being used.

The advance round trip component will provide the following:

a. One advance round trip:

   i. Taken with the spouse or one immediate family member moving with the employee, consisting of a single amount determined by multiplying the General Services Administration (GSA) daily lodging and meals/incidentals rate for the new duty station by 6.25 (refer to GSA.gov); or

   ii. Taken by the employee or spouse, consisting of a single amount determined by multiplying the GSA daily lodging and meals/incidentals rate for the new duty station by 5 (refer to GSA.gov).

   iii. If the employee is unable to take the trip, at least one (but no more than two) family members who are moving with the employee may take the trip, consisting of a single amount determined by multiplying the GSA daily lodging and meals/incidentals rate for the new duty station by 5 for one person, and multiplied by 6.25 for two people (refer to GSA.gov).

b. Travel allowance:

   i. Travel by the transportation mode (e.g., privately owned vehicle (POV), airline, train) determined to be most advantageous by the Postal Service for one round trip to the new duty station for the employee; and/or

   ii. Transportation expenses for one additional round trip at the transportation mode determined to be most advantageous by the Postal Service for one immediate family member who is moving with the employee.

c. Car rental allowance

   i. Available only if the new duty station is 300 or more miles from the old residence and the employee flies or takes a train to the new duty station area. At the government/military contract rate, the allowance is not to exceed a total of $400. Only the rental charges are reimbursable. Additional options selected for the employee's convenience and refueling charges are not reimbursable.

   ii. If the new duty station is less than 300 miles from the old residence, the employee may be authorized to receive an amount equal to the round trip mileage plus 100 miles at the published GSA standard mileage rate.

The following conditions apply to the advance round trip component:

a. The employee must take the trip before the report-to-work date provided on the relocation authorization.

b. Time will be recorded as work hours for scheduled workdays during the period of absence for the approved advance round trip. The employee will not be charged leave.

c. Expenses for this trip are included in the lump sum allowance.

d. The employee must drive a POV if the mileage from the old residence to the new duty station is less than 300 miles. The employee must take the most direct route to limit the amount of travel time. Travel allowance for flying is only allowed when the new duty station is 300 or more miles from the old residence.

e. If the employee owns or leases a residence within the commuting area of the new duty station at the time benefits are authorized, the employee is not eligible for the advance round trip or temporary quarters allowance.

f. If the employee's spouse is employed by the Postal Service and is moving to the new duty location, the spouse may take this trip with, or instead of, the employee. The spouse will be paid for work hours on scheduled workdays while on the trip and will not be charged leave. The spouse must take this trip before the family moves to the new duty station.

g. In lieu of a spouse, another immediate family member who is relocating with the employee may utilize the advance round trip benefit.

7.6.1.2 Temporary Quarters

The temporary quarters component includes:

a. 30 calendar days per diem (lodging and meals/incidentals) at 75 percent of the daily GSA locality rate at the new duty station for the employee.

b. 30 calendar days at 25 percent of the meals/incidentals daily GSA locality rate for each dependent moving with the employee.

The actual number of trips or days spent in temporary quarters does not change the basis for calculating the lump sum allowance.

7.6.2 En Route Travel Expenses

En route travel occurs when an employee and/or their family leaves the old residence to report to the new duty station. The employee must use the en route trip to report to work or to accompany their family to the new duty station when they vacate the old residence. The employee's family may travel with the employee or separately at a later date.

The following conditions apply:

a. The travel schedule must be coordinated with officials at both the old and new duty stations.

b. The employee will be in work status for scheduled workdays while traveling en route and will not be charged leave.

c. The employee is required to drive their POV when the mileage to the new duty station is less than 600 miles. The employee must take the most direct route to limit the amount of travel time.

d. The employee and accompanying family members must drive at least 300 miles per day. If travel time exceeds that of the most direct route, or if less than 300 miles per day is driven, the employee must charge any extra travel time to annual leave or leave without pay.

e. If actual travel involves departure or destination points other than the old and new residences, authorized travel time cannot exceed the time of the most direct route between duty stations. The employee must charge any extra travel time to annual leave or leave without pay.

f. If the employee's spouse is employed by the Postal Service and moving with them, the spouse will be in work status while traveling en route and will not be charged leave for scheduled workdays.

An exception to the daily minimum driving distance may be made when a delay is beyond the control of the employee, such as weather emergencies, government restrictions, when the employee is an individual with a disability as defined by Section 501 of the Rehabilitation Act of 1973, or when the employee's alternative fuel POV cannot meet the daily minimum driving distance due to vehicle range capability and fueling availability limitations.

7.6.2.1 Transportation, Lodging, and Per Diem

An authorized employee and their immediate family members, are eligible for reasonable lodging expenses capped at the GSA lodging rate plus taxes, POV mileage, parking fees (in cases where the employee has a choice between valet or self-parking, reimbursement will be capped at the self-parking rate), ferry fees, bridge/road and tunnel fees, coach air or train fare, and transportation to and from terminals, plus the following:

a. For the employee: 75 percent of the daily per diem rate of the new duty station for the first and last day of travel; full per diem for all other days the employee is in a travel status.

b. For the spouse: 75 percent of the employee's per diem rate if traveling with the employee or the employee's full per diem rate if the spouse is traveling alone.

c. For all other immediate family members: 75 percent of the employee's per diem rate.

Per diem is only authorized for travel less than 12 hours when the total distance traveled is more than 100 miles. When en route travel is completed in 1 day, per diem will be applied as follows:

a. For the employee: 75 percent of the daily per diem rate of the new duty station.

b. For the spouse and immediate family members: 75 percent of the employee's daily per diem rate.

c. For a spouse travelling alone: 75 percent of the daily per diem rate of the new duty station.

7.6.2.2 Privately Owned Vehicle

The employee must travel to the new duty station in a POV if the distance from the old residence to the new duty station is less than 600 miles. The use of a government- or Postal Service-owned vehicle for relocation-related travel is not authorized.

The employee must drive at least 300 miles per day and use the most direct route when traveling from the old residence to the new duty station or residence. An employee who deviates from the most direct route or arrives at other destination points is responsible for the extra expenses, including mileage or lodging, or time incurred.

The following rules apply to reimbursement for mileage when using a POV:

a. If the employee or a member of the employee's immediate family drives an authorized POV to the new duty station, mileage reimbursement for each authorized POV will be at the rate listed for the vehicle type on the GSA.gov travel website.

b. If immediate family members are not moving with the employee, the employee may claim reimbursement for driving one POV to the new duty station.

c. If immediate family members are moving with the employee, the employee may claim reimbursement for driving as many POVs as there are licensed drivers moving.

7.6.3 Miscellaneous Expense Allowance

An employee who is authorized a permanent change of station is eligible to claim $150 if single, or $300 if relocating with a spouse or family, as a miscellaneous expense allowance (MEA). This benefit is intended to cover any relocation-related expenses not otherwise covered by the Postal Service. Itemization is not required for reimbursement.

To receive payment of the MEA, the new Form 50, *Notification of Personnel Action*, must be processed, and one of the following triggering events must occur:

a. The employee has sold the old residence or broken the lease at the old duty station.

b. The employee has completed a contract to purchase or lease a residence at the new duty station.

c. The employee has scheduled and begun the movement of household goods.

d. When a/b/c do not occur, the employee must demonstrate evidence that a physical move has taken place.

7.6.4 Shipping Household Goods

The Postal Service pays for transporting household goods, in one lot, from the old residence to the new residence at the new duty station. The RMF coordinates activities associated with the shipment of household goods to the new duty station, including, but not limited to:

a. Appointing a consultant to review procedures with the employee and establish a moving date.

b. Selecting a qualified van line or agent.

c. Determining what can and cannot be shipped or stored.

d. Monitoring packing, loading, and arrival schedules.

e. Resolving and processing damage claims (if any).

f. Shipping household goods up to a total net weight of 18,000 pounds.

g. Providing $180,000 (maximum) current-replacement-value insurance on household goods.

h. Providing a $2,000 (maximum) allowance for crating and uncrating items that require this service, as identified by the RMF agent or van line.

i. Providing a $350 (maximum) allowance for disassembly and assembly of recreational items, such as pool or other game tables. Assembly of such items only applies to those items that were disassembled at the departure location by the RMF agent or van line.

j. Storing household goods up to 60 calendar days (if necessary). The approving official may authorize up to 15 calendar additional days, but no more.

The employee is responsible for the following:

a. Ensuring that only the immediate family's personally owned household goods are shipped.

b. Ensuring items such as jewelry or items of great sentimental value are either carried personally by the employee or listed on the household goods inventory report.

c. Paying for and making arrangements for shipping certain goods that the RMF does not handle, such as:

    i. Airplanes, collectible or antique cars, camper trailers, boats over 14 feet that do not fit in the moving van, utility and boat trailers, storage sheds, ammunition, lithium batteries, pets, birds, livestock, building materials, and firearms of any kind.

    ii. Any collection of property intended for use in conducting a business, other commercial enterprise, or hobby such as collecting stamps, coins, or other items of value.

d. Paying for: (1) additional insurance; (2) excess charges; and (3) special packing, crating, and handling of household goods items beyond the weight and other limits authorized by the Postal Service.

e. Paying for and making arrangements for shipping household goods: (1) over the 18,000 pound limit; (2) obtained en route to the duty station; and (3) that the RMF consultant or van-line agent have identified as not appropriate for shipping.

f. Paying for an extra pickup or drop-off of household goods within a reasonable distance from the authorized departure/destination points.

7.6.4.1 Shipping Privately Owned Vehicles

Authorization for shipping a POV by car carrier will be considered only if the employee owned the POV before being assigned to a new duty station. The following conditions apply:

a. The employee may ship one POV by car carrier if the mileage from the old residence to the new duty station is more than 600 miles.

b. The employee may ship two POVs by car carrier: (1) if the distance from the old residence to the new duty station is more than 600 miles; and (2) more than one licensed driver among the immediate family members is moving with the employee.

c. Under no circumstances will shipment by car carrier be authorized for more than two POVs.

d. The employee will be provided a reasonable allowance to obtain a rental car at their new duty station when they ship a POV.

If either the old or new duty station is OCONUS (i.e., Hawaii, Guam, Puerto Rico, U.S. Virgin Islands, or a foreign country), only one POV will be authorized for shipment, regardless of the number of licensed drivers in the employee's immediate family. The following guidelines apply to shipping a POV to or from the CONUS.

a. The Postal Service will reimburse these expenses:

    i. Customary expenses at the port of embarkation, including crating and packing expenses, shipping charges, and port charges for preparing the POV to be shipped.

    ii. Customary expenses at the port of debarkation, including uncrating.

    iii. One-way transportation costs or mileage to drive to pick up or deliver a POV to a port other than the port of origin or destination.

b. When determining whether to authorize POV shipping costs, the Postal Service will compare the cost of shipping with the blue book value of the POV.

7.6.5 Moving a Mobile Home

An employee who is eligible for an allowance to ship household goods may use the benefit for moving a mobile home to use as the new residence (within CONUS only). The benefits received for moving a mobile home are provided in lieu of shipment of household goods and in addition to payment for en route travel.

The employee must make arrangements for moving a mobile home. The RMF does not arrange for the shipment of mobile homes. The employee must make a written request to the Manager, Travel and Relocation that states the employee and/or immediate family will live in the mobile home at the new duty station. The request must be received in advance of the relocation authorization form. The total amount authorized for moving a mobile home will be no more than the maximum amount that would have been allowed for shipping or storing household goods.

The following services are not reimbursable:

a. Costs of maintenance, repair, storage, and insurance for valuing the home above the carrier's maximum responsibility.

b. Charges designated in the tariffs as special services, including services for transporting a mobile home, such as packing and unpacking, that are necessary or desirable, but not essential.

Certain charges required by state law, such as pilot cars, may be reimbursed.

If an employee tows a mobile home with a POV, the Postal Service will pay 11 cents per mile above the GSA mileage rate to cover all transportation costs. Bridge, road, and tunnel tolls, ferries, and other travel-related charges are not reimbursed. An employee who has not been paid for en route travel to the new duty station may claim the standard mileage rate for a POV in addition to the mileage rate for the mobile home.

7.7 Relocation Leave

Relocation leave is paid time off related to relocation that is granted at the discretion of the employee's manager, generally for packing, delivering, and unpacking household goods. The employee is authorized to use up to 5 days (in 8-hour increments) of relocation leave, and the days do not have to be consecutive. Relocation leave is only granted to an active employee who has been authorized relocation benefits. Relocation leave is also available to the employee's spouse if they are also employed by the Postal Service.

8 Expense Payments and Reimbursements

8.1 Waiving Repayment of Relocation Expenses

Repayment of relocation benefits will be waived for an employee who is involuntarily reassigned to a new duty station for the Postal Service's benefit before completing the 1-year commitment. The employee is not required to obtain a waiver under this circumstance.

If an employee voluntarily accepts a new position and does not complete the 1-year commitment they must obtain an approved waiver of repayment, or an employee receivable account will be established for the repayment of all expenses associated with the move. The amount will be prorated based on the amount of time remaining in the 1-year agreement. There is no time limit for the creation of the employee receivable account. The Postal Service reserves the right to establish an employee receivable account to collect on debt at any time.

Employees who are impacted by organizational change are exempt from the repayment commitment whether voluntarily or involuntarily reassigned.

If an employee is in the process of relocating and accepts a new position that requires another move, any unused relocation benefits from the current relocation will not be available after authorization for the new benefits is received.

8.2 Conditions for Reimbursement or Payment

To be eligible for reimbursement or payment of real estate expenses, an employee must meet all the following conditions:

a. The title to the residence (which may be a mobile home) at the old or new duty station, or the interest in a cooperatively owned dwelling or an unexpired lease, meets one of the following criteria:

   i. It is in only the employee's name.

   ii. It is jointly in the employee's name and in the name of one or more members of their immediate family.

   iii. It is solely in the name of one or more members of the employee's immediate family.

b. The title cannot be held in a trust.

c. For disposition of property at the old duty station, the employee or their immediate family must have acquired the title or interest in the property before being informed of the transfer.

d. For acquisition of property at the new duty station, the employee or their immediate family must have acquired title or interest in the new property after being informed of the transfer.

e. The expenses of selling a home or settling a lease are for the principal residence at the time the employee is informed of the transfer.

f. The settlement dates for selling or terminating the lease on the old residence and purchasing a new residence are not later than 1 year after the report-to-work date at the new duty station.

g. The employee has paid the expenses and occupied the home.

h. If the residence is a multiple-occupancy dwelling and the employee only occupies part of it, expenses will be reimbursed or paid on a prorated basis. In addition, expenses will be limited to a reasonable amount required for the residence site.

i. Expenses will not be reimbursed or paid for the purchase or sale of more than 5 acres.

j. The maximum home value for which allowable closing costs will be reimbursed is $800,000. Any costs attributable to home values over this amount are not reimbursable, and the employee must pay them.

Noncompliance with the conditions listed in this section may result in an adjustment to the reimbursable settlement costs.

8.3 Documenting Expenses

For en route travel expenses, original receipts must always be provided for the following items:

a. Passenger tickets for air, rail, or bus. Air travel tickets must show the passenger's name, class, flight, date, and price charged.

b. Lodging. Itemized lodging invoices must show a zero-balance due. If the balance is not zero, the employee must provide proof of payment in addition to the lodging invoice.

c. Rental cars and fuel.

Each expense claimed for real estate transactions must be supported by documentation showing that the expense was, in fact, paid. Allowable documentation includes a copy of the following:

a. A fully executed purchase agreement, including any addendum pages.

b. A fully executed sales agreement, including any addendum pages.

c. A signed Closing Disclosure/Settlement Statement for a sale of the home at the old duty station and/or the purchase of a home at the new duty station.

d. Invoices or receipts for any expenses not included on the Closing Disclosure/Settlement Statement.

e. Disclosure statement required by the Truth in Lending Act issued by the Board of Governors of the Federal Reserve System and the Truth in Lending Act, Title I, Public Law 90-321, for all charges made by the lending institution toward the purchase of a new residence. A disclosure statement as stipulated under the Truth in Lending Act is not required when the employee assumes a loan from the seller. If the employee assumes a loan from the seller, a statement must be added to this effect to the expense report.

The Postal Service will not reimburse any fee, cost, charge, or expense it determines is part of the finance charge under the Truth in Lending Act.

8.4 Tax Assistance

For tax purposes, some reimbursements paid to the employee or payments made on the employee's behalf for relocation expenses are considered part of their taxable income. Tax assistance is an amount the Postal Service pays directly to these organizations:

a. Internal Revenue Service (IRS) for federal taxes.

b. Social Security Administration for the employee's portion of old age, survivors, and disability insurance (OASDI).

c. The employee's state of residence, on the employee's behalf, as an estimate of the income tax the employee will owe for certain relocation expense reimbursements and payments.

The employee is responsible for paying any additional tax owed that is not included in the estimated amount paid by the Postal Service and the RMF.

The Postal Service does not provide tax assistance for Medicare taxes, the loan origination fee, or local income taxes.

In order to properly withhold payments and expense reimbursements from taxable income, the employee must adequately account for these expenses within a reasonable period of time. Adequate accounting means documenting all expenses correctly. If the employee does not adequately account for expenses within a reasonable period of time, payments made on the employee's behalf or reimbursements for otherwise qualified expenses may be subject to income tax withholding.

For state income tax purposes, the RMF must use the state tax code on file in the master file record at the Eagan Accounting Services Center. The employee is responsible for maintaining the correct state code.

8.4.1 Relocation Expenses Not Subject to Income Tax Withholding

If the move is considered a qualified relocation by the IRS, reimbursements and payments made on the employee's behalf for certain business-related expenses may not be subject to federal income tax withholding as long as certain IRS guidelines are met.

8.4.2 Relocation Expenses Subject to Income Tax Withholding

On the employee's Form W-2, *Wage and Tax Statement*, the Postal Service will report as income all relocation-related expenses and reimbursements required by the IRS to be included in the employee's taxable income, including:

a. En route trip expenses for all transportation, lodging and meals, and a percentage of the mileage reimbursement based on IRS guidelines.

b. The lump sum allowance.

c. Expenses related to the sale of the employee's old residence and the purchase of the employee's new residence that may be taxable, such as the lease-breaking expenses.

d. The miscellaneous expense allowance.

e. The expense of moving and storing household goods.

f. Tax assistance.

9 Glossary

Term	Definition
Broker or Agent Network	Real estate brokers and/or agents affiliated with the RMF. They are available to assist with relocation, and relocating employees must use them for real estate transactions that will be reimbursed by the Postal Service. Those who decide to use an outside broker must ensure the broker agrees to pay any referral fees entitled to the RMF.
Effective Date of Transfer	Date that an employee's new position is effective, as shown on PS Form 50, *Notification of Personnel Action*.
Household Goods	Personal property that may be transported legally in interstate or intrastate commerce and that belongs to the employee (or immediate family) at the time the employee is notified of the transfer and before shipment or storage begins. This includes household furnishings, equipment, appliances, furniture, clothing, books, and similar property. Household goods does not include (1) items such as airplanes, recreational vehicles, camper trailers, boats over 14 feet, utility and boat trailers, storage sheds, firearms, ammunition, pets, birds, livestock, or building materials; (2) a collection of property, such as wines, stamps, coins, classic or antique cars, or food stores; (3) home office equipment used to conduct a business, other commercial enterprise, or hobby.
Mobile Home	A manufactured dwelling constructed on a metal frame, designed to be mobile, and used as a residence. Mobile homes have metal frames that are not removed and may have a vehicle identification number. If wheels, axles, towing mechanisms, or related mobility hardware features have been removed and the structure has been affixed to a foundation, it is still considered a mobile home.
Modular Home	Homes built in a manufacturing facility in sections and then transported to the home site 70 percent to 95 percent complete. The sections of a modular home are lifted onto the foundation by crane. Modular homes are not constructed on frames and are often considered higher quality than stick-built homes due to controlled conditions at the factory. Modular homes are not considered mobile homes.
New Duty Station	Location where an employee will regularly report for work. On PS Form 50, *Notification of Personnel Action*, it is called the Duty Station. For relocation purposes, the new duty station is the physical location of the Duty Station Finance Number.

Term	Definition
Principal Residence	An employee's main home from which they regularly commute. Before the employee leaves the old job location, the principal residence is the old residence; at the employee's new job location, it is the new residence. The term principal residence does not include (1) other homes owned or maintained by the employee and/or members of the employee's immediate family; (2) seasonal or second homes, such as a beach or vacation home.
Privately Owned Vehicle (POV)	Automobile, motorcycle, or airplane not owned by the Postal Service and used by the traveler for the primary purpose of personal transportation. For the purpose of relocation, POVs exclude vehicles intended for commercial or recreational use, including automobiles classified as collectible or classic, regardless of their frequency of use for daily commuting.
Relocation Management Firm (RMF)	A company contracted by the Postal Service to provide: (1) counseling on Postal Service relocation policy; and (2) services related to residential transactions, movement of household goods, and reimbursement of relocation expenses.
Report-to-Work Date	Date on which an employee is required to physically report for duty at the new duty station.
Transferred Employee	A Postal Service employee transferred from one official duty station to another station within the Postal Service for permanent duty.

10 Appendix

Appendix A: Benefits

Benefit	Bargaining Employees
Advance round trip travel[1]	10 calendar days
Temporary quarters[2]	30 calendar days
En route travel and per diem	YES

Benefit	Bargaining Employees
Miscellaneous expense allowance	$150 if single $300 with family
Tax assistance — federal, state, OASDI tax[3]	YES
Household goods shipment	YES
Household goods storage[4]	60 calendar days
Home marketing assistance	YES
Home-mortgage counseling	YES
Home finding assistance[5]	YES
Old home closing costs	YES
New home closing costs	YES
Breaking a lease	YES

1. *Travel time for one advance round trip, not to exceed 10 calendar days. Scheduled workdays in this travel period are recorded as work hours. The lump sum allowance is calculated to include advance round trip expenses.*

2. *Temporary quarters allowance is calculated for 30 days and is included in the lump sum allowance.*

3. *Federal Insurance Contributions Act for OASDI withholding is tax-assisted. Medicare withholding is not tax-assisted.*

4. *Storage of household goods may be extended up to a maximum of 75 days when authorized by the approving official.*

Appendix B: Closing Disclosure/Settlement Statement Reference List – Old Duty Station

Description	May Be Reimbursed
Sales/broker's commission	YES
Items payable in connection with loan	NO
Items required by lender	NO
Reserves deposited with lender for hazard insurance, mortgage insurance, city/county taxes, assessments	NO
Settlement or closing fee	YES
Abstract or title search[1]	YES
Title examination	YES
Title insurance binder	NO
Document preparation	YES
Notary fee	YES
Attorney/closing agent fees[2]	YES
Title insurance: lender coverage	NO
Title insurance: owner coverage[1]	YES
Recording/filing fees: deed/mortgage/releases[3]	YES
City/county tax/stamps: deed/mortgage[4]	YES
State tax/stamps: deed/mortgage[4]	YES
Survey	YES

Description	May Be Reimbursed
Inspections: pest only	YES
Other costs:	
Home warranty	NO
Transfer fees	NO
Express Mail and messenger fees[5]	YES

1. *Seller normally furnishes an abstract or title opinion. In some areas, the seller provides title insurance: owner coverage. If the employee pays both the abstract/title opinion, and title insurance: owner coverage, the Postal Service will reimburse the greater of the two charges, but not both.*
2. *Attorney services required at settlement must appear on the closing statement and will be reimbursed up to $500. Attorney services of more than $500, or attorney services not on the closing statement, must be accompanied by (a) an itemized breakdown for the services provided, (b) the fees for each item of service, and (c) a statement indicating why an attorney was required for each service provided. Litigation and negotiation costs are not reimbursed.*
3. *Seller normally pays to record release of deed and the buyer pays for recording the mortgage and tax/stamps.*
4. *Seller normally pays for customary fees as directed by the state and the buyer pays mortgage tax/stamps.*
5. *Maximum reimbursement is $75.*

Appendix C: Closing Disclosure/Settlement Statement Reference List — New Duty Station

Description	May Be Reimbursed
Loan origination fee[1]	YES
Loan discount fee	NO
Appraisal	YES
Credit report	YES
Lender's inspection fee[2]	YES

Description	May Be Reimbursed
Mortgage insurance application fee	NO
Assumption fee/buy-down	NO
Commitment fee	NO
Loan processing fee	YES
Flood certification	YES
Underwriting fee	YES
Tax service fee	YES
Mortgage insurance/escrow	NO
Flood insurance	NO
Taxes due/escrow	NO
Settlement or closing fee	YES
Abstract or title search[3]	YES
Title examination/other statutory title fees[3]	YES
Title insurance binder	YES
Document preparation	YES
Notary fee	YES
Attorney/closing agent fees[4]	YES
Title insurance: lender coverage	YES
Title Insurance: owner coverage[3]	YES

Description	May Be Reimbursed
Escrow fee	YES
Recording fees: mortgage/releases[5]	YES
City/county tax/stamp: deed/mortgage[6]	YES
State tax/stamps: deed/mortgage[6]	YES
Survey[7]	YES
Inspection: pest only	YES
Inspections: all other[8]	NO
Other costs:	
Transfer fees	NO
Express Mail and Messenger Fees[9]	YES
Loan Assumption Fee	NO
VA or FHA Funding Fee[1]	YES
Loan Application Fee	YES

1. *Maximum reimbursement is 1 percent for the loan origination fee or the VA/FHA funding fee. If the employee paid both of these fees, reimbursement will be provided for one fee with a maximum reimbursement of 1 percent.*

2. *Maximum reimbursement is $250.*

3. *Reimbursement is available for the greater of either title examination, title search, abstract, other statutory title fees, or title insurance: owner coverage. The employee cannot claim both.*

4. *Attorney services required at settlement must appear on the closing statement and will be reimbursed up to $500. Attorney services more than $500, or attorney services not on the closing statement must be accompanied by (a) an itemized breakdown for the services provided; (b) the fees for each item of service; and (c) a statement indicating why an attorney was required for each service provided. Litigation and negotiation costs are not reimbursed.*

5. *The buyer normally pays for recording the mortgage, and the seller pays to record the deed release.*

6. *The buyer normally pays for mortgage tax/stamps, and the seller pays for customary fees as directed by the state.*

7. *Maximum reimbursement is $750.*

8. *Inspections required by the lender or required by federal, state, or local statute or ordinance may be reimbursed. The employee must provide documentation stating that the inspection was required.*

9. *Maximum reimbursement is $75.*