Relocation Procedure – Bargaining Employees

Reference #

TBD

Document Category

Procedure

Related Policy

F-15-C, Relocation Policy – Bargaining Employees

Content

Contains procedures that apply to relocation and its associated expenses.

Owner

Executive Director, Compensation and Benefits

Executive Leadership Team (ELT) Sponsor

Chief Human Resources Officer

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July 2026

Summary of Major Changes

These procedures and their supporting materials supersede the January 2016 edition of Handbook F-15-C, Relocation Policy — Bargaining Employees.

Summary of Major Changes:

- Separated procedures from policy.
- Updated naming convention for roles and systems.
- Streamlined information for home sale, home buying, and relocation activities in chronological order.
- Updated to reflect use of the relocation management firm online expense reporting system for managing relocation activities and expenses.

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 procedure to the Owner.

These and other trademarks may appear in the document and are among the many

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1 Purpose

The purpose of this document is to describe United States Postal Service (USPS) relocation procedures in accordance with the USPS F-15-C Relocation Policy.

2 Scope

These procedures are applicable to USPS bargaining employees and equivalent grade positions in the United States Postal Inspection Service (USPIS).

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 System (ACS) employees, and equivalent positions within USPIS and the Office of the Inspector General (OIG) is contained in F-15-A Relocation Policy and F-15-A Relocation Procedure. Relocation policy and procedure for USPS 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.

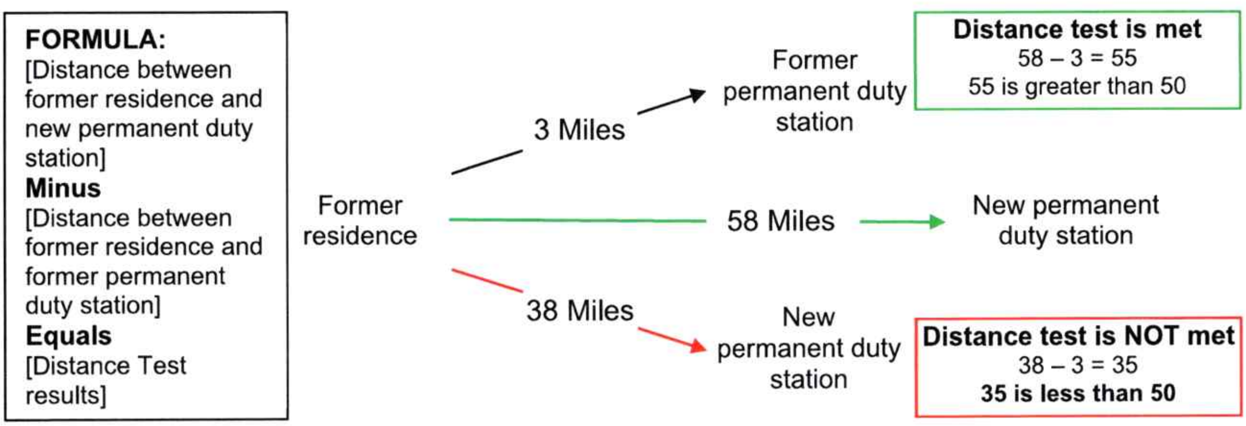
2.1 Deviations

Only in extreme circumstances will a deviation from the F-15-C Policy be considered. To request a deviation, the employee's vice president must make a written request to the Executive Director, Compensation & Benefits, who will review the request and make the final decision.

3 Calculating the 50-Mile Rule

Postal Service personnel use internet mapping tools to verify the location and distance moved, and their determination is final. Headquarters' (HQ's) final check occurs at the time of authorization. The transferee does not need to provide verification but can use the illustration and formula shown in the figure below to calculate the 50-Mile Rule distance requirements. In addition to this rule, the transferee must meet all other eligibility requirements in accordance with the F-15-C Relocation Policy.

Figure 1: 50-Mile Rule



4 Relocation Management

All authorized relocation benefits are arranged through the relocation management firm (RMF). The employee submits expense reports through the RMF's online expense reporting system (refer to 6.3 Expense Reports). The RMF assigns a consultant to assist the employee in coordinating relocation activities and answer questions regarding benefits.

The transferring employee and their hiring manager(s) can contact the Relocation Unit for relocation information using either of the following methods:

a. Typing "Relocation" into the address line in the Postal Service Outlook.

b. Sending an email to F47R00@usps.gov from an outside server.

If an employee has an Individually Billed Travel Card and uses it for relocation expenses, they must pay the travel card provider directly.

5 Relocation Benefits

An employee seeking relocation benefits should request authorization from their approving official (or designee) in accordance with the F-15-C Relocation Policy. Benefits are authorized as follows:

1. The employee's approving official (or designee) completes the relocation authorization form by following instructions within the form, which includes a link to email the completed form to the RMF.

2. HQ Relocation Unit is notified of the pending authorization and completes the final approval.

3. The RMF schedules a counseling session with the employee and provides the employee with the relocation agreement by email.

4. The employee reviews and signs the agreement then returns it to the RMF.

5.1 Home Sale

For bargaining employees, the Direct Reimbursement Program is the only home sale option. In accordance with the F-15-C Relocation Policy, the employee lists the home at the old duty station with an RMF network broker or agent until it is sold. After the sale is closed, the employee submits a reimbursement request with documentation through the RMF's online expense reporting system.

5.1.1 Marketing Assistance

An employee can obtain marketing assistance as soon as contact with the RMF is initiated. RMF arranges contact between the broker and the employee to provide home-marketing advice to the employee, with the goal of helping the employee get the best possible price for the home in a reasonable period of time. When the employee receives counseling from the RMF, the RMF counselor provides the names of affiliated primary brokers in their neighborhood.

5.2 Home Buying

Participating in the home buying program requires use of an RMF network broker or agent until the new home is purchased. To help the employee find a new home at the new duty station, the RMF consultant gives the employee a list of brokers or agents in the RMF network. The employee should interview the brokers or agents, select one, and notify the consultant. The new broker or agent meets with the employee in the new location, gives the employee a tour of the neighborhood(s), and provides information about the new location, especially the real estate market.

The employee may find their own mortgage lender for purchasing the new home or can receive assistance through the RMF. The RMF mortgage counseling program provides the following:

a. Guidance through the process of obtaining a home mortgage.

b. Information about the kinds of mortgages available, including rates, fees, and lender's requirements.

c. Information about the prequalification process.

d. Referral to at least three lending sources.

5.3 Breaking a Lease

To receive reimbursement for breaking a lease for their primary residence at the departure duty station, the employee must submit the claim for expenses to the RMF separately from the claim for expenses related to buying a home to receive reimbursement. The employee must not pay more than one month at a time on a cancelled lease. Each item must be supported with a copy of the lease agreement and proof of payment.

5.4 Allowable Expenses

5.4.1 Lump Sum Allowance

If funds are authorized for an advance round trip, the employee will receive a calculated lump sum that enables them and/or one of their immediate family members to find permanent housing at the new duty station. The lump sum is calculated:

a. Based on family composition and the distance to the new duty station.

b. By the RMF, based on the General Services Administration (GSA) per diem rates published for the new duty station.

The lump sum may include an advance round trip component, a temporary quarters component, or both. The lump sum amount is paid by the RMF as follows:

1. The authorization must be received by the RMF and processed by the HQ Relocation Unit prior to payment.

2. The employee requests payment of the lump sum allowance through the online expense reporting system on the RMF website.

The employee will be reimbursed at the current per diem and mileage rates published on the GSA.gov website.

5.4.2 En Route Travel Expenses

The Postal Service reimburses transportation expenses or mileage for the use of a privately owned vehicle (POV) or air transportation for en route travel at GSA rates (refer to GSA.gov). The RMF calculates the maximum number of days allowed for travel by dividing the one-way mileage by 300 miles and applying the per diem percentages in accordance with the policy.

5.4.3 Miscellaneous Expense Allowance

To receive payment of the miscellaneous expense allowance (MEA), the following conditions must be met:

a. Human Resources Shared Service Center must process the employee's PS Form 50.

b. A triggering event (as described in F-15-C Relocation Policy Section 7.6.3 Miscellaneous Expense Allowance) must occur.

c. The employee must submit a request for payment as explained in 6.4 Reimbursement.

5.4.4 Movement and Storage of Household Goods

Employees must not pack any household items prior to arrival of the moving company.

If the employee needs to store household goods, the RMF organizes storage for up to 60 days. If the employee needs an extension, the approving official can authorize 15 additional days, but no more.

5.4.5 Moving a Mobile Home

If an employee chooses to move a mobile home, either by commercial carrier or by towing it with a POV, reimbursement will be calculated based on mileage for the most direct route between the old and the new residences.

5.5 Relocation Leave

Relocation leave is charged to Code 080 in the Time and Attendance Collection System.

6 Expense Payments and Reimbursements

6.1 Repayment Agreement

If an employee does not complete the 1-year commitment and does not obtain an approved waiver of repayment, the employee must repay the prorated amount based on the number of months remaining in the 1-year agreement. The total expenses incurred by the Postal Service for the employee's relocation are included in the prorated repayment calculation and can include, but are not limited to, payments made to the employee, payments made on the employee's behalf, taxes, and administrative fees.

6.2 Waiving Repayment of Relocation Expenses

If an employee is voluntarily or involuntarily transferred to a new duty station before completing the 1-year commitment, the following process is used to request a waiver of repayment of relocation expenses:

1. The employee's vice president at the current duty station must support the request and send a letter requesting a waiver of the prorated repayment of all expenses to the Executive Director, Compensation & Benefits.

2. The Executive Director, Compensation & Benefits reviews the request and makes the final decision.

3. All current fiscal-year costs of the original move may be transferred to the gaining office.

If an employee does not obtain a waiver, an employee receivable will be established for the repayment of all expenses associated with the previous move. The amount will be prorated based on the amount of time remaining in the 1-year commitment. There is no time limit for the creation of the employee receivable. The Postal Service reserves the right to collect relocation debt at any time after the 1-year commitment is broken.

6.3 Expense Reports

The RMF consultant provides information and answers questions on how to utilize their expense reporting system. eTravel is not utilized for relocation expense reports. The RMF online expense reporting system is used to:

a. Submit expense reports for payment of authorized relocation benefits.

b. Review previously submitted expense reports.

c. Update or review personal profile information.

Electronic expense reports are submitted via the RMF online expense report system as follows:

1. The employee must submit a separate expense report for each type of expense, such as the lump sum allowance, en route travel allowance, miscellaneous expense allowance, and residence transactions.

2. If a subsequent report for the same type of expense is submitted, the subsequent report must always reference the original report. For example, if the employee amends the claim for en route travel expenses, the second report must refer to the first report.

3. If the employee needs to submit original receipts and other supporting documents by mail, the employee asks the RMF consultant for instructions and a mailing address.

4. The employee should keep a copy of all expense reports and documents for their files.

An employee without reliable internet access should contact the RMF consultant for copies of paper forms, instructions, and a mailing address.

6.4 Reimbursement

To request reimbursement for relocation expenses, including en route travel and MEA, the employee must submit a claim using the RMF's online expense reporting system. Reimbursement requests must be made within 1 year of the report-to-work date. A relocation consultant employed by the RMF will explain how to document and submit expense reports, and upon submission and approval verification of any necessary and supplemental documentation (e.g., receipts), the RMF sends payments and reimbursements to the transferring employee's bank account via direct deposit. All relocation expenses are charged to the new duty station's finance number.

6.5 Documenting Expenses

The employee must have all required receipts before submitting an expense report through the RMF online expense reporting system. Documentation may be in the form of canceled checks or signed receipts. The employee must submit copies of documents related to residence transactions.

6.6 Tax Assistance

Some reimbursements paid to the employee, or payments made on the employee's behalf, for relocation expenses are considered part of taxable income. Tax assistance is calculated based on the employee's new annual salary and the family status information the employee has provided. Each payment or reimbursement paid to the employee by the Postal Service and the RMF includes the employee's estimated tax assistance.

The employee is responsible for maintaining the correct state code. To accomplish this, the employee must complete a copy of PS Form 1198, *Request for State Income Tax Withholding*, and mail it to this address:

HUMAN RESOURCES SHARED SERVICE CENTER
PO BOX 970100
GREENSBORO NC 27497-0100

If the state tax code does not match the finance record or a state with reciprocity when state taxes are reported, the Eagan Accounting Service Center (ASC) will change the code to that of the mailing address of the employee's duty station finance number.

The employee must adequately account for expenses within a reasonable period of time. What constitutes a reasonable period of time can vary depending on the employee's particular situation. The following actions will generally be treated as meeting the reasonable period of time requirement:

a. The employee adequately accounts for expenses within 60 days after the employee incurred the expense or was reimbursed.

b. The employee returns any excess reimbursement within 120 days after the employee incurred the expense or was reimbursed.

6.6.1 Withholding Taxes

The RMF calculates and the Postal Service pays taxes at the employee's estimated federal and state tax rate, rounded to the nearest dollar. When the employee files tax returns, the employee, the IRS, and state tax authority determine actual liability. Relocation payments and all Postal Service-paid tax assistance will appear on the employee's Form W-2. Around the time the employee receives Form W-2 from the Postal Service, the RMF provides a relocation summary package that documents all payments made to the employee or to a third party on the employee's behalf.