

U.S DEPARTMENT OF EDUCATION
PERSONNEL MANUAL INSTRUCTION

PMI 300-2

DATE MAY 05 1981*

APPROVED:

Lois E. Hartman

Director of Personnel

(8-7-2001)

SUBJECT: DETAILS OF ED EMPLOYEES

*as amended

Inst. 1, 12/4/81

Inst. 2, 5/6/85

Inst. 3, 12/29/85

I. AUTHORITY

The statutory and delegated authorities under which employees of this Department may be detailed can be found under subheadings IV, V, and VI below.

II. APPLICABILITY

- A. This Instruction supplements FPM Chapter 300, Subchapter 8, of the Federal Personal Manual (FPM) and sets forth Departmental policy and procedures on details of employees within the Department of Education (ED) and between ED and other Federal departments and agencies.
- B. This Instruction does not apply to details between ED and non-Federal organizations under the Intergovernmental Personnel Act of 1970, nor does it apply to details to public international organizations.

III. DEFINITION

- A. A detail is the temporary assignment of an employee to a different position or set of duties and responsibilities for a specified period with the employee expected to return to his/her position of record at the end of the detail, as the affected employee continues to encumber the position from which detailed. "Acting" designation may also be considered as details.
- B. The term "detail" is to be distinguished from the following:
 - 1. Temporary duty which means the performance of duty by an employee in a travel status when such duty is related to the employee's regular position ;
 - 2. Assignment to perform one or more of the regular duties of the position to which the employee is appointed in a location away from the employee's regular work place.

3. Assignment of an employee to participate in a training course or developmental assignment related to the duties of his /her current official position; and
4. Task Force membership when the employee is participating for the purpose of representing his/her agency.

IV. DETAILS WITHIN ED

A. Authority

1. Section 3341 of Title 5, U.S.C. is the specific authority under which personnel may be detailed within the Department. This section gives the head of an executive department the authority to detail employees among the divisions and offices of the Department, except those employees who are required by law to be exclusively engaged in some specific work. * The Comptroller General has determined that details within an agency should be made on a reimbursable basis (b-211372 dated March 20, 1985).
2. In ED responsibility and authority for details has been placed with the Deputy Under Secretary for Management who has delegated authority as indicated in the General Requirements and Responsibilities in the following Section IV. B.
3. The authority of officials who may approve details is subject to the limitations stated in FPM Chapter 300, Subchapter 8, and this Instruction.

B. General Requirements and Responsibilities

1. Supervisors may approve the detail of employees under their jurisdiction for a period of 30 days or less, whether within or outside of the organization in which the employee is working. Supervisors may also request the detail of employees from other offices for 30 days or less. There is no requirement that these details be processed through the Personnel Office but, in accordance with 5 U.S.C. 3341, there should be written documentation of the approval. Details of 30 days or less may be processed on a nonreimbursable basis and details in excess of 30 days will be on a reimbursable basis.
2. Division Directors or equivalent Staff Office heads may approve the detail of a headquarters employee under their jurisdiction to another classified position at the same or lower grade level within headquarters in 120-day increments but not to exceed one year. They may also request the detail of employees from other offices in 120-day increments but not to exceed one year. To insure that statutory and regulatory requirements are met, the proposal to approve such a detail must be discussed with the Personnel Office.

3. Regional Program Directors are authorized to approve or request the detail of employees to classified positions at the same or lower grade level under their appointing authority from one office in their respective regions to another office within the same region in 120 day increments but not to exceed one year. Such approval is subject to concurrence of the Regional Program Director of the losing office. Regional Program Directors are also responsible for insuring that statutory and regulatory requirements are met with respect to these details.
 4. Assistant Secretaries or equivalent are authorized to approve or request details of personnel, other than those covered by the authorization to Division Directors and Regional Program Directors, between offices of the Department (regions and headquarters) when such details are to the same or lower grade for one year or less and approved in 120 day increments. This authorization must be obtained before final arrangements are made with either the receiving office or individual employee.
 5. When a detail is expected or proposed to exceed one year , the Personnel Office will obtain the concurrence of the Deputy Under Secretary for Management and the approval of the Office of Personnel Management (OPM).
 6. In conjunction with the Merit Pay Performance Appraisal System, performance agreements are required for details expected to last 30 days or longer. The same requirement exists for employees covered by the Department's Performance Appraisal System for non-SES and non-Merit Pay employees. Such agreements should be prepared at the beginning of the detail and the appraisal completed no later than 30 days after the end of the detail.
- C. Requirements and Procedures for Processing Details
1. Submission of Requests: Requests should be submitted on a properly documented SF-52 , with accompanying documents; i.e., statement of the reason for and the duration of the detail, position description and method of payment (reimbursable or non-reimbursable) . For details processed on a reimbursable basis , the losing agency or organization will forward an SF-1081 (Voucher and Schedule of Withdrawals and Credits) to the finance office of the gaining organization for certification and submission to the Department of Treasury. The SF-52 must be signed by both the requesting and approving officials.

2. Types and Length of Details

- a. Details to the same or lower grade position may be approved initially or extended subsequently in 120 day increments up to a maximum period of one year . Extensions beyond one year will require the approval of OPM.
- b. Details to higher grade positions may be approved for a period not to exceed one year during a major reorganization (a major reorganization means an organizational change including transfer of function, the elimination, addition, or redistribution of functions or responsibilities affecting a major segment of a departmental component). However, if an employee's services are needed in a higher grade position for more than brief periods (60 days for bargaining unit and 120 days for non-bargaining unit) managers and supervisors are encouraged to make temporary promotions instead.
- c. Details to positions at a higher grade or with known promotion potential and which are expected to exceed 60 days for bargaining unit employees or 120 days for non-bargaining unit employees must be made under the competitive procedures of the Department's merit promotion plan.
- d. Details to unclassified duties may be approved for a maximum period of 120 days. In unusual situations, OPM may grant an extension. (See PMI 300-4 Details to Unclassified Duties.)

3. Approval by the Office of Personnel Management

- a. The Personnel Office will obtain OPM approval for those details or extensions of details requiring such approval. That Office will make the determination whether OPM approval is necessary. The following documentation is required by the Personnel Office in obtaining OPM approval:
 - 1) Justification statement for the detail;
 - 2) A current SF-171 for the employees;
 - 3) A current official position description for the employee's position of record; and
 - 4) A classified position description for the position being filled by detail.

- 4. Office Concurrence: Approval of a proposed detail between ED offices is subject to the concurrence of the losing office.

V. DETAILS BETWEEN EXECUTIVE DEPARTMENTS AND AGENCIES

A. Authority

1. Sec. 601 of the Economy Act of June 30, 1932, as amended (31 U.S.C. 686) authorizes the detail of an employee by one department or agency to another on a reimbursable basis. * The Comptroller General has ruled that details under this authority should be made on a reimbursable basis (B-211373 dated March 20, 1985).
2. In ED responsibility for the control of details to and from other Federal departments and agencies has been placed with the Director of Personnel.

B. General Requirements and Responsibilities

1. Details under this section will be considered on the basis of the ability of the unit concerned to spare the employee's services without detriment to the work of the unit; the importance of the proposed assignment; and the detail is related to the Department's appropriation.
2. Details to the Department of Education should be requested only when a fully qualified employee is not available from a source within the Department, unless special circumstances necessitate the detail of an individual who is pending transfer to ED.
3. Supervisors may approve details for their employees for a period of 30 days or less. Supervisor may also arrange for the detail of employees of other Federal agencies for 30 days or less .
4. The Director of Personal must authorize all details in excess of 30 day of employees to and from other Federal departments and agencies before final arrangements are made. (See Exhibit I). If details are expected to exceed 120 days, the Director of Personnel will obtain the concurrence of the Deputy Under Secretary for Management or his/her designee. Final authorization will be subject to the approval of the losing agency.
5. The losing agency or organization will forward an SF-1081 (Voucher and Schedule of Withdrawals & Credits) to the finance office of the gaining organization for certification and submission to the Department of Treasury for reimbursable details .
6. * A nonreimbursable detail is permitted only when the detail is related to the loaning agency's appropriation and will help to accomplish the purpose for which the appropriation was provided or will have a negligible impact on the

loaning agency's appropriation. All other details must be on a reimbursable basis.*

C. Procedures for Obtaining Authorization by the Director of Personnel

1. Federal departments and agencies must request the detail of ED employees in writing addressed to the Director of Personnel . The request should be signed by the head of the agency or his/her designee and must provide the following information :
 - a. Reason for the detail
 - b. Statement of duties to be performed
 - c. Title, series and grade range unless specific ED employee is requested
 - d. Duration of detail
 - e. Reimbursable or non-reimbursable
 - f. Any special authority the agency may have for the detail
2. ED offices seeking the detail of an employee from other Federal agencies will follow the same procedure listed above.

D. Length of Detail: The legal limitation of U.S.C. 3341 and the OPM restrictions in FPM Chapter 300, Subchapter 8, do not apply to details Federal departments and agencies . Details to or from Federal departments and agencies should be limited to the shortest time possible and should not exceed 120 days. An extension beyond six months will be considered by the Deputy Under Secretary for Management only when justified by compelling reasons.

E. Office of Personal Management Approval: The OPM has no jurisdiction over details between Federal departments or agencies , therefore no requests for details outside of the Department of Education will be submitted to OPM for approval.

VI. DETAILS TO THE WHITE HOUSE OFFICE

A. Legal Authority: ED employees may be detailed to the White House Office for temporary assistance under 3 U.S.C. 107 (White House Office does not include those components and agencies such as the Domestic Council , OMB , CSA , etc., which are in the Executive Office of the President.) Details to Executive Office of the President components and agencies will be handled as details between departments and agencies.

B. Authority to Approve Details: Details of 30 days or less may be approved by the employee's supervisor. Details in excess of 30 days must be authorized by the Director of Personnel. If details are expected to exceed 120 days, the Director of Personnel will obtain the concurrence of the Deputy under Secretary for Management or his/her designee.

- C. Requirements and Procedures: ED officials are encouraged to cooperate to the fullest extent possible in the detailing of employees to the White House Office for temporary assignments. Usually requests for details will be addressed to the Deputy Under Secretary for Management. Any other requests received from the White House staff or from persons purporting to speak for a member of the White House staff should be referred to the Assistant Secretary for Management for consideration and review with the Secretary as appropriate.
- D. Reimbursement : Generally details of 90 days or less will be non-reimbursable and those exceeding 90 days will be handled on a reimbursable basis .
- E. . Length of Details: Usually details to the White House Office will not exceed one year . It has been the practice of the White House to request the transfer of the employee to White House Office rolls if the employee cannot be returned to the agency at the end of one year.

VII. Documentation

- A . Both the detailing and the receiving agency or organization will be notified in writing by the Personnel Office when the detail of an ED employee has been approved by the Director of Personnel .
- B . The Personnel Office for the receiving agency or organization will be responsible for furnishing to the Personnel Office of the detailing agency or organization a copy of the classified position description for the temporary assignment .
- C . The Personnel Office for the detailing agency or organization will be responsible for recording the detail in the employee's Official Personnel Folder as required by FPM Chapter 300 , Subchapter 8.

EXHIBIT I
REQUEST FOR DETAIL OF ED EMPLOYEES TO OTHER AGENCIES

EMPLOYEE'S NAME: _____

CURRENT POSITION:
(TITLE, SERIES AND GRADE): _____

CURRENT ORGANIZATIONAL
LOCATION: _____

ORGANIZATION TO
WHICH DETAILED: _____

POSITION TO WHICH
DETAILED (TITLE, SERIES, AND
GRADE): _____

PROPOSED
DURATION OF DETAIL
(EFFECTIVE DATE AND TERMINATION DATE: _____

REIMBURSABLE/NON REIMBURSABLE: _____

BRIEF STATEMENT OF DUTIES (Attach PD if available):

JUSTIFICATION (Reason for detail, any specific legislation, need for critical skills not available):

Approved _____
Signature of Approving Official and Date

TABLE OF CHANGES

Remove Page	Insert Page	Explanation of Changes
3 and 4	3 and 4	Change wording in paragraph 4 on page 3 and paragraphs a, b, c, d, and e to clarify meaning.

Pen and Ink Changes

Page 2 IV-B paragraph 2, line 1 insert “equivalent” after “or”.

Page 5 V-B paragraph 4, line 5 change “Assistant” to “Deputy Under”.

Page 6 Paragraph D, lines 5 and 6, change “six months’ to “120 days” and change “Assistant” to “Deputy Under”.

Page 6 VI-B, line 5, change “Assistant to “Deputy Under”.

Page VI-C, line 4 and line 7, change “Assistant” to “Deputy Under”.

TABLE OF CHANGES

Remove Page	Insert Page	Explanation of Changes
3 and 4	3 and 4	<p>Amends Section IV. B. 4. to separate the wording on obtaining approval for details for one year and make these procedures paragraph 5; changes paragraph 5 to 6 and changes wording to include employees covered under the General Performance Appraisal System.</p> <p>Amends Section IV. C. 2. to delete paragraph c, change paragraph d to c and paragraph e to d and revise paragraph b and c to include number of days for details of bargaining unit and non-bargaining unit employees.</p>

Pen and Ink Changes

Page 1, Section III. A., last line, change “are” to “may” and insert “be” after “also”.

TABLE OF CHANGES

Remove Page	Insert Page	Explanation of Changes
2 and 5	2 and 5	Amends section IV. A.1 and section V.A.1, V.B.1 and V.B.6 to include the new Comptroller General's decision on nonreimbursable detail.