



Relocation Guidelines

Coming Together to Change the World



Sandia National Laboratories

Relocation Guidelines

Sandia Corporation

(Effective September 25, 2006)

Employee classifications covered by this guideline:

Management
Technical Staff
Laboratory Staff
Postdoctoral Appointees
Technologists

Introduction

These guidelines contain Sandia's policy on expense reimbursement for travel and relocation costs incurred by new full-time employees. If you have questions after reading the Relocation Guidelines, contact Relocation Services before taking action or incurring costs. You may call toll free by dialing 1-800-417-2634, and then enter the appropriate number below:

- Albuquerque and all locations except Livermore 845-2351
- Livermore 294-3798

Sandia will reimburse travel and living expenses for you and your dependents living in the household at the time of relocation. For your use, a New Employee Worksheet is enclosed to help you keep track of these expenses. Reimbursement is based on actual expenses, with receipts required, except as noted.

All provisions of these guidelines must be used within **9 months** of commencing work at Sandia.

Important Note: An employee who voluntarily resigns within 1 year of commencing work will be responsible for reimbursing the Corporation for the full amount of all relocation monies paid to or for you by Sandia. A relocation agreement will be signed to that effect.

Eligibility

In order for an employee to qualify for relocation benefits, the one-way commuting distance from your residence, at the time of job offer, to the new Sandia work location must be at least 50 miles greater than the one-way commuting distance from that residence to the former work location.

**No Duplication
of Relocation
Benefits**

Duplicate benefits will not be provided when more than one employee from the same household is hired by Sandia. It will be the employees' decision to designate which person will be responsible for requesting reimbursement for your household.

**Medical Exam
and
Fingerprints**

The employee who is required to complete his or her pre-employment medical examination at a facility other than Sandia may be reimbursed for the reasonable cost of the examination. The cost of fingerprint cards needed for your security clearance may also be reimbursed. Mileage or transportation to or from the facility is not reimbursable. No relocation costs should be incurred until you have received your drug screen results, because expenses will not be reimbursed if the test is positive.

**Making Travel
Reservations**

Reservations must be made through Sandia's designated travel agent. One full business day after submitting your Relocation Agreement, you may call Travelocity Business (TBIZ) at 1-866-SNL-TBIZ (1-866-765-8249) and provide the following information:

- identify yourself as a new Sandia employee
- ask for lodging accommodations within the per diem rate
- provide a personal credit card number for the charges

International new employees will need to make reservations by dialing "0" and asking to be connected with an AT&T Direct Line Operator. After being connected, ask the AT&T Direct Line Operator to dial 1-866-SNL-TIBZ (1-866-765-8249) for Travelocity Business. Provide TBIZ with the information shown above.

Travelocity Business is available 24 hours a day, 7 days a week.

**How to be
Reimbursed**

Reimbursement can only be made once you have commenced work at Sandia. Complete the Employee's Expense Voucher, attach the New Employee Worksheet and all necessary receipts, and submit everything to Relocation Services in the envelope provided. Separate vouchers should be completed for the medical examination, fingerprints, house hunting, predeparture, relocation travel, and temporary living. The Relocation Services mail stops are listed below:

- Albuquerque MS 0183
- Livermore MS 9904

Employees are not reimbursed for expenses incurred on personal days.

Relocation Allowance

New employees are authorized to receive a \$1000 Relocation Allowance for miscellaneous expenses incurred as a result of relocating their household. The allowance is to be applied to relocation expenditures that are essential in establishing a new residence, for example:

- vehicle registration, inspection fees, and applicable taxes
- driver's license fees and test fees
- connection and installation fees, and
- boarding pets during house search and temporary living periods

Additional expenditures associated with establishing a residence at the new work location will be your responsibility. Relocation Services will authorize this allowance for payment at the time you submit your voucher for travel reimbursement. This allowance will be included in your paycheck and will be identified as a separate line item.

Note: In the case where more than one employee is hired from the same household, only one Relocation Allowance will apply.

HOUSE HUNTING TRIP

Purpose

For employees relocating within the United States or District of Columbia, Sandia will facilitate your efforts to make prompt housing arrangements in the new work location by providing one house hunting trip for you and one member of your immediate family.

Alternately, once you have commenced work at Sandia, you may take a reverse house hunting trip to facilitate the move from the former residence. The same benefits are provided that would have been allowed on a house hunting trip.

Note: House hunting (or reverse house hunting) days will be deducted from the allowable days provided for temporary living expenses.

Covered Expenses

Sandia will provide reimbursement for the following expenses:

- ✓ round-trip airfare, at the lowest logical fare, for the employee and one member of your immediate family
 - ✓ travel agent fees
-

Covered Expenses
(continued)

- ✓ lodging for 7 nights, limited to per diem
 - GSA per diem rates can be found at: www.gsa.gov
 - \$15 host allowance, when lodging with a friend or relative*
- ✓ meals and incidental allowance for 8 days*
 - \$30 per day per person 12 years of age and over; \$15 per day per person under 12 years of age
- ✓ rental car and gas for 8 days
- ✓ one safe arrival call (\$5 maximum) and local phone calls
- ✓ internet access
- ✓ airport parking for 8 days, or economical ground transportation to and from the airport

Note: If traveling 300 miles or less one way, airfare, rental car, and airport parking are not authorized; mileage for driving your personal vehicle to and from the new work location and around the local area will be reimbursed at the standard mileage rate.*

**Receipt is not required for reimbursement.*

SHIPPING HOUSEHOLD GOODS, PERSONAL EFFECTS, AND VEHICLES

Moving Your Household

If you are a relocating within the U.S. or District of Columbia and want to have your household goods and personal effects shipped, complete and return the “*Household Goods Shipment Authorization*” form (SF4001-S) as soon as possible, **but no later than 4 weeks before the pick up date that you designate.**

You are fully responsible for any injury to self or others involved with the movement of your belongings. Sandia assumes no responsibility for loss or damage to property, household goods and personal effects, vehicles, rental vehicles, or equipment.

The shipment of household goods and personal effects is limited by the following:

If the move is...

- **within the U.S. or District of Columbia**
- **outside the U.S. or District of Columbia**

Then the shipment is limited to...

20,000 pounds

Reimbursement of up to \$8,000 in actual shipping costs and coverage against loss or damage

**Vehicle
Shipment**

The shipment of a vehicle is limited by the following:

If the move is...

- **within the U.S. or District of Columbia**
- **outside the U.S. or District of Columbia**

Then the shipment is limited to...

Applicable to second vehicle only, unless stated otherwise in this guideline
Reimbursement of up to \$2,000 in actual shipping costs and coverage against loss or damage

**Arrangements
by Sandia**

Sandia will select the moving company and initiate the process to:

- ✓ pick up from a single point of origin and deliver to the new residence location
- ✓ pack your goods for shipment, furnishing boxes, cartons, crates and packing materials within standard commercial practices
- ✓ transport your goods to the new residence location
- ✓ unpack or provide a debris pick up
- ✓ store household goods and personal effects at the new residence location for up to 60 days, if necessary

If the employee chooses to store at a facility that is not affiliated with Sandia's authorized moving company, the moving company's liability ends upon delivery and no further shipping benefits, including delivery out of storage and unpacking, will be provided.

Self-Move

In lieu of shipping, you may choose to self-move your household goods and personal effects. Sandia will reimburse actual costs up to the authorized moving company's shipping estimate. A "*Household Goods Shipment Authorization*" form (SF4001-S) must be submitted prior to the move requesting "**estimate only.**" The employee may voucher:

- ✓ boxes, packing materials, and gas
- ✓ rental of pads, dolly, tow bar, and vehicle
- ✓ tolls and metered parking*
- ✓ non-metered parking
- ✓ storage of household goods and personal effects at the new residence location for up to 60 days, if necessary
- ✓ insurance premium costs up to \$700, to protect against loss or damage to household goods and personal effects during the move

**Receipt is not required for reimbursement.*

**Contact
Information**

Fax your Household Goods Shipment Authorization to the appropriate number shown on the form. If you are not contacted by Sandia's authorized moving company within 3 working days of submitting the form, call Relocation Services toll free at 1-800-417-2634, and then dial the appropriate number below:

- Albuquerque 845-2351
 - Livermore 294-3798
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**Protection
Coverage**

Limited protection against loss or damage resulting from mishandling is provided on the total value of household goods, personal effects, and vehicles when the move is performed by a Sandia authorized moving company, or its subcontractor, and stored at their facilities. Each employee is responsible for discussing coverage with the moving company. Any additional protection against loss or damage will be at your expense. The limited full value protection requires:

- the household goods and personal effects to be packed by a professional from the authorized moving company
 - boxes that you pack will not be covered against loss or damage
 - the moving company to remove packing materials
 - at the time of delivery if you request removal, or
 - at a later scheduled debris pick up if you wish to unpack yourself
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**Exclusions from
Payment or
Reimbursement**

Sandia will not pay or reimburse for the following items:

- ✓ animals, including livestock, horses, and house pets
- ✓ boats, camping trailers, farm equipment, mobile homes, airplanes
- ✓ auxiliary structures or contents, other items too large to fit in the van
- ✓ heavy or bulky items such as shop equipment, firewood, construction materials
- ✓ dismantling, reassembling, expedited services, pick up from and/or delivery to more than one location, or other special services
- ✓ living expenses occasioned by a delay in shipment of the employee's household goods
- ✓ tips, gifts, or other gratuities paid to moving company personnel
- ✓ services performed by any persons other than Sandia authorized moving company personnel
- ✓ moving companies contracted by the employee
- ✓ items transported by the employee when shipping household goods
- ✓ shipment of household goods in excess of 20,000 pounds or additional storage expenses

Note: The moving company cannot transport plants, perishable foods, aerosols, flammable liquids, corrosive or hazardous materials, or ammunition.

Protect Your Shipment

For your protection, Sandia recommends:

- ✓ Make an inventory of all items to be shipped.
 - ✓ Avoid shipping:
 - coins, currency, stock certificates, bonds, notes or other negotiable paper
 - deeds, titles, bank books, tax returns and other important documents
 - jewelry, precious stones or metals
 - collections, items of historic significance or high valueItems such as these are your personal responsibility; therefore you must notify the moving company of any such articles to be shipped.
 - ✓ Do not leave personal belongings in your furniture (e.g., clothing in dresser drawers, papers or books in a desk) unless the furniture can be locked and you are in possession of the key.
 - ✓ Have the driver explain any symbols (such as M/S, which means marred and scratched) and challenge in writing on the inventory any symbols that seem to exaggerate or mistake the conditions. Have the driver sign the challenged inventory.
 - ✓ Count all boxes, crates, and cartons as they leave the house and be sure that your count agrees with the shipping papers. Do not sign the moving company's Bill of Lading until you agree with the quantities, notations, and symbols stated.
 - ✓ Watch the unloading and setting up of furniture, and examine each piece. If items are damaged or missing, indicate this on the Bill of Lading and inventory.
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Loss or Damage

If you discover loss or damage, contact the authorized moving company. Any settlement must be made with the carrier.

RELOCATION TRAVEL

Requirements

If you own a vehicle, you and your dependents are expected to drive to the new work location. The employee may request to have his or her second vehicle shipped when:

- the new work location is more than 300 miles from the former residence, and
- the employee's family travels together in one personally owned vehicle

A vehicle shipped in conjunction with household goods and personal effects will not be counted against the weight limit specified.

By Car

Again, you are expected to travel in your personally owned vehicle. Sandia will reimburse:

- ✓ standard mileage rate, for the most direct route, applicable for up to two personally owned vehicles*
- ✓ lodging, actual expense up to per diem for each travel day
 - GSA per diem rates can be found at: www.gsa.gov
 - \$15 host allowance, when lodging with a friend or relative*
- ✓ meals and incidents allowance, for each travel day*
 - \$30 per day per person 12 years of age and over; \$15 per day per person under 12 years of age
- ✓ tolls and metered parking*
- ✓ non-metered parking fees
- ✓ safe arrival calls*
 - one safe arrival call per day (\$5 maximum), not to exceed \$15 total

**Receipt is not required for reimbursement.*

Note: You are expected to travel approximately 400 miles per day, and the travel voucher must indicate the daily mileage traveled. Lodging and meals and incidental expenses will be reimbursed on the days approximately 400 miles were traveled, and 250 miles on the last day of travel. The mileage you voucher will be compared for reasonableness to the mileage provided in Yahoo! Driving Directions, which can be found at: maps.yahoo.com/dd.

By Air

Common carrier air transportation is authorized if the employee does not own a vehicle or is traveling from outside the contiguous U.S. Sandia will provide reimbursement for:

- ✓ airfare, at the lowest logical fare
- ✓ travel agent fees
- ✓ travel day lodging, limited to per diem
 - GSA per diem rates can be found at: www.gsa.gov
 - \$15 host allowance, when lodging with a friend or relative*
- ✓ travel day meals and incidental allowance*
 - \$30 per day per person 12 years of age and over; \$15 per day per person under 12 years of age
- ✓ economical ground transportation to the airport
 - taxi or rental car, whichever is less
- ✓ rental car, at the new work location, for up to 7 days
 - up to 30 days for international new employees, or until vehicle shipped prior to departure has arrived at the new residence location

By Air
(continued)

- ✓ one safe arrival call*
 - \$5 maximum/\$10 maximum for international new employees

**Receipt is not required for reimbursement.*

Note: Travel by air for other reasons must be authorized in advance by the manager of the California Site Human Resources Department for Livermore employees, or Relocation Services for employees reporting to Albuquerque and other locations. In this case, only one vehicle will be shipped and rental car is authorized for up to 7 days, if shipped vehicle has not arrived.

PREDEPARTURE AND TEMPORARY LIVING

Predeparture

Predeparture expenses are approved for up to 5 days when you and your family must vacate the former residence in preparation for departure to the new work location. The employee may voucher:

- ✓ lodging, limited to per diem
 - domestic GSA per diem rates can be found at: www.gsa.gov
 - international U.S. DOS foreign per diem rates can be found at: <https://secureapp2.hqda.pentagon.mil/perdiem/perdiemrates.html>
 - \$15 host allowance, when lodging with a friend or relative*
- ✓ meals and incidental allowance for domestic new employees*
 - \$30 per day per person 12 years of age and over; \$15 per day per person under 12 years of age
- ✓ meals, limited to per diem as established by the U.S. DOS foreign per diem rates for international new employees
- ✓ internet access

Note: Predeparture days will be deducted from the allowable days provided for temporary living expenses.

Temporary Living

Temporary living expenses may be provided at the new work location for up to 30 days, less days reimbursed for house hunting and predeparture, when there is a delay in moving into the home at the new location. The following temporary living expenses may be vouchered:

- ✓ lodging, limited to per diem
 - GSA per diem rates can be found at: www.gsa.gov
 - \$15 host allowance, when lodging with a friend or relative*
-

Temporary Living
(continued)

- ✓ meals and incidental allowance*
- ✓ internet access

**Receipt is not required for reimbursement.*

Note: If temporary living is for less than 7 days and there is no kitchen facility, then you may voucher the meals and incidental allowance for each person. If temporary living is for 7 days or more, then accommodations should have a kitchen. When there is a kitchen facility or when temporary living is for 7 days or more, the family meals and incidental allowance of \$30 per day per family may be vouchered.

TAX INFORMATION

Taxable Moving Expenses

The table below lists the reimbursements and allowance that may be provided for a new employee, and indicates whether these items represent taxable income. If an item is taxable, then income tax on the payment will be withheld from your pay. No tax assistance is provided by Sandia. Tax laws change frequently; therefore consult your personal tax advisor for tax advice concerning relocation.

Item	Withholding required?
Relocation Allowance	Yes
Medical examination	Yes
Fingerprint cards	Yes
House hunting trip	Yes
Mileage rate reimbursement in excess of the IRS deduction	Yes
Reverse house hunting trip	Yes
Self-move of goods/effects to new work location	No
Storage of goods/effects at new work location, first 30 days	No

**Taxable Moving
Expenses**
(continued)

Item	Withholding required?
Storage of goods/effects at new work location, days 31 – 60	Yes
Predeparture and temporary living	Yes
Travel by employee to new work location	No
Travel by spouse/dependents to new work location	No
Meals reimbursement during travel to new work location	Yes
Rental vehicle at new work location	No
