# RELOCATION ASSISTANCE

Prepared by

B&W Technical Services Y-12, LLC
Managing & Operating Contractor
for the
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# 1. INTRODUCTION

We are happy that you have accepted employment at the Y-12 National Security Complex, and we want to help make your relocation to the area as smooth as possible.

The Y-12 Relocation Assistance Program can lessen the financial burden of relocating. Assistance is available to eligible transfers and new hires who meet the criteria determined by Human Resources.

Because the relocation experience can be complicated and stressful, Y-12 has assigned a relocation administrator as your point of contact. There will be plenty to do to prepare for your new job apart from relocating, so let the relocation administrator guide you during your transition.

# 2. RELOCATION PROCESS

To help make your relocation to East Tennessee smoother, we've assembled some information to get you started and to answer a few of your questions. Take a few minutes to check out the information in this section to find out what to expect. To get started relocating your family, be sure to fill out your Relocation Agreement and send it to your relocation administrator before making any relocation decisions.

We encourage you to schedule a meeting with your relocation administrator within the first 2 weeks after reporting to work. During your meeting, the relocation administrator will help you complete your expense reports and answer any of your questions regarding the relocation process.

Since all travel arrangements related to your relocation will need to be approved by your relocation administrator, it is a good idea to keep him up-to-date on your travel plans.

If you have questions about the relocation process, be sure to contact your relocation administrator.

## 2.1 Relocation Agreement

The Relocation Agreement (UCN-21434) (see Appendix), which is completed by all new relocating employees, is the first step in starting the relocation process (the form is provided when you accept a position at Y-12). The agreement provides the relocation administrator with information that will help manage the relocation process. By signing the agreement, you also agree to return all relocation costs reimbursed to you or on your behalf if employment at Y-12 terminates within one year.

If you have accepted a position at Y-12:

- Complete and sign the Relocation Agreement, and confirm that the relocation administrator has received it before proceeding with any relocation activity.
- Do not put your home up for sale or conduct any relocation activity until you have completed the Relocation Agreement.

## 2.2 Corporate Charge Card

Costs associated with relocation—such as lodging, rental car, airfare, meals, and incidentals—are paid by you and are reimbursed after you complete a Relocation Expense Report (UCN-13A) (see Appendix). The Y-12 Travel Services department can provide a corporate charge card that can be used as an option to pay for relocation costs.

If you need a charge card, be sure to submit the corporate charge card application at the same time you submit the Relocation Agreement (UCN-21434) (see Appendix). Employees are responsible for managing and paying the balances for their corporate charge cards.

## 2.3 General Information

Relocating employees are reimbursed for necessary and reasonable expenses associated with relocation. Such expenses include, for example, transportation; house hunting; shipping of possessions; trips home; and settling in, selling, and acquiring a home.

We encourage you to schedule a meeting with the Y-12 relocation administrator within the first 2 weeks after reporting to work. During the meeting the relocation administrator will assist with completing expense reports and answer any questions regarding the relocation process.

All travel arrangements related to relocation must be approved by the Y-12 relocation administrator.

You must complete all aspects of the relocation process within 1 year from the date of employment or transfer. Reimbursement of expenses will stop if employment is terminated.

You must submit relocation expenses within 90 days of the date the expenses are incurred.

All relocation expenses are reimbursed upon completion of the Relocation Expense Report (UCN-13A). Here are things to remember when completing expense reports:

- Receipts must be provided unless the expense is directly billed to Y-12.
- Lodging is reimbursed at actual cost not to exceed the General Services Administration (GSA) per diem rate (http://www.gsa.gov/portal/category/21287) as stated in the Federal Travel Regulation (FTR) (http://www.gsa.gov/portal/content/104790).
- Tax on lodging is reimbursed and is not limited to the GSA per diem rate.
- Use of privately owned automobiles is reimbursed at the same rate as the Internal Revenue Service (IRS) (http://www.irs.gov/Tax-Professionals/Standard-Mileage-Rates) approved rate.
- Laundering of clothing is a miscellaneous travel expense provided you spend at least four consecutive nights on official travel.
- You will be reimbursed for an unlimited number of official phone calls to accomplish your work assignment and for one 15-minute personal phone call each day.
- Reimbursement for receipted toll charges is allowed over and above the mileage, meals, and incidental expense allowances.

## 2.4 House-Hunting Trip

One house-hunting trip (not to exceed 10 days) is allowed. Travel costs, lodging costs, and meals and incidental expenses are reimbursed at the standard General Services Administration per diem rate (http://www.gsa.gov/portal/category/21287).

The trip may be made by you alone, or by you and your spouse together, or by your spouse alone. If you decide to take a house-hunting trip, it must be completed before you report to work.

Your spouse may take a house-hunting trip at any time before the relocation of the family but not later than 1 year from the date of transfer or employment.

Automobile rental expenses are reimbursable; but mileage, gasoline, upgrades, and insurance are not reimbursable. However, automobile insurance coverage is automatically provided when the rental is arranged by Y-12 through a company car rental account.

Transportation by public carrier is reimbursable if the new assignment is more than 250 miles from the old assignment, up to the equivalent of the lowest coach airfare plus reasonable expenses to and from the terminal.

If a personal vehicle is used as transportation to and from the airport, mileage is reimbursed based on the most direct route at the current Internal Revenue Service (IRS) mileage rate (http://www.irs.gov/Tax-Professionals/Standard-Mileage-Rates).

If a personal vehicle is used as the primary transportation and the trip occurs before relocating to the new assignment, local mileage associated with house hunting at the new location will also be reimbursed at the current IRS mileage rate.

## 2.5 Shipping Household Goods

Here are some important points to remember about shipping household goods:

- Transportation and storage of up to 18,000 lb of household goods are allowed.
- The maximum period for storage of an authorized shipment of household goods is 90 days.
- Household goods shipped are insured at full replacement value up to $75,000.
- Items such as professional books or tools required for the job do not have to be included in the shipment of personal and household goods.
- Personally owned professional books, papers, and equipment required for the job may be transported as an administrative expense to the hiring organization if the organization approves.
- The company will pay for the cost of a self-move truck plus actual vehicle mileage via the most direct route or a self-move truck plus the fuel for the truck via the most direct route.
- The company will pay for reasonable packing supplies (for example, boxes and tape).

## 2.6 Shipping Automobiles

One personally owned vehicle (POV) may be shipped by freight, with the following limitations:

- Distance must be more than 500 miles from the former residence to the new location.
- The vehicle must be in operating condition (shipment of antique automobiles is not authorized regardless of operating condition).
- Storage charges at point-of-origin or destination are not an allowable cost.

If your inbound travel to the new location is by air, two POVs may be shipped. However, the cost of the second POV is reimbursable at the Internal Revenue Service medical and moving mileage rate (http://www.irs.gov/Tax-Professionals/Standard-Mileage-Rates).

If your report-to-work date is expedited by Human Resources and sufficient time is not allowed to drive a POV, the shipment of the second POV is allowed at full cost with approval from the manager of the Chief Financial Officer Division.

All necessary expenses directly related to shipping a vehicle are allowed, including crating and packing expenses, shipping charges, and port charges to ready the vehicle for shipment.

## 2.7 Renting an Automobile

If you decided to ship your personally owned vehicle (POV), rental car cost for transportation is allowed for up to a maximum of 4 weeks or until the arrival of the shipped POVs, whichever occurs first. Up to 3 days for a rental car at the pre-departure location is allowed.

Reimbursement covers the cost of a mid-size vehicle at the company's discount rate and includes infant car seat rental cost.

Mileage, upgrades, gasoline, and insurance costs are not reimbursable. However, insurance coverage is automatically provided when the rental is through one of Y-12's direct bill agreements with a rental car company.

Rental car costs are not reimbursable once the POV has arrived at your new location.

## 2.8 Inbound Travel

Inbound travel by public carrier is allowed if it is more than 250 miles from the old location. Reimbursement covers the equivalent of economy refundable airfare. Actual and reasonable expenses to and from the terminal are also covered. Air travel arrangements must be approved and arranged by the Y-12 relocation administrator.

If one personally owned vehicle is driven to the new location, mileage costs are reimbursable at the Internal Revenue Service business mileage rate (http://www.irs.gov/Tax-Professionals/Standard-Mileage-Rates). If two personally owned vehicles are driven to the new location, mileage costs for the second vehicle are reimbursable at the Internal Revenue Service medical and moving mileage rate (http://www.irs.gov/Tax-Professionals/Standard-Mileage-Rates).

During inbound travel, a minimum of 400 miles must be traveled per day. The Rand McNally website (http://www.randmcnally.com/) allows you to calculate mileage by entering your beginning location and destination.

Toll charges and reasonable phone calls are reimbursable.

Lodging is reimbursed at the General Services Administration (GSA) rate for the city of lodging. Actual lodging receipts are required. Meals and incidental expenses (M&IE) are paid at the current GSA rate for the city of lodging.

M&IE for the first travel day is paid at 75% of the standard M&IE GSA per diem rate for the person traveling. Travel days between the first and last travel days are paid at the full standard GSA per diem rate for the person traveling.

## 2.9 Settling In

During the settling-in period, you will receive temporary lodging and allowances for meals and incidental expenses (M&IE) immediately following your inbound move for a maximum of 60 days or until you obtain long-term permanent residence, whichever occurs first.

Your spouse and dependents are limited to 45 days of M&IE.

Up to three days of the 60-day settling-in period may be used at the pre-departure location. Day 1 for all (you, your spouse, and dependents) begins at the time any member of the immediate family arrives at temporary lodging, which must begin no later than 30 days from the date you report to work.

Any days of settling in claimed for lodging and M&IE past the first 30 days are reimbursed at a reduced per diem rate. See table below for details.

| | The "maximum daily amount" of per diem that | | |
|---|---|---|---|
| | **you and/or your unaccompanied spouse may receive** | **your accompanied spouse or an immediate family member age 12 or older may receive** | **an immediate family member under age 12 may receive** |
| **For settling in** | | | |
| First 30 days of temporary quarters | Applicable per diem rate | 0.75 times applicable per diem rate | 0.5 times applicable per diem rate |
| Any additional days of temporary quarters | 0.75 times applicable per diem rate | 0.5 times applicable per diem rate | 0.4 times applicable per diem rate |
| **For house hunting** | | | |
| | Applicable per diem rate | 0.75 times applicable per diem rate | None |
| **While en route** | | | |
| | Applicable per diem rate | 0.75 times applicable per diem rate | 0.5 times applicable per diem rate |
| **For trips home** | | | |
| | Applicable per diem rate | 0.75 times applicable per diem rate | None |

Local transportation expenses such as mileage, gasoline, and rental car incurred for any purpose during and after the settling-in period are not reimbursable.

Settling-in costs are reimbursed by submitting a Relocation Expense Report (UCN-13A) with itemized receipts for lodging costs.

A reduced lodging per diem is allowed for staying with family or friends during the settling-in period.

## 2.10 Trips Home

All trips home must be arranged and approved by the Y-12 relocation administrator before the travel occurs.

One trip home is allowed if members of your immediate family are still at the previous location or there is a need to conduct personal business associated with prior housing.

Lodging for a trip home is reimbursable if the trip home occurs during the settling-in period. If the trip home occurs after the settling-in period, only travel costs and rental car costs associated with the trip are reimbursable.

# 3. SETTLING RESIDENTIAL COSTS

The costs involved in moving and relocating can be overwhelming. Because we want you to be able to focus on learning about and becoming acclimated to your new job, Y-12 has reimbursement assistance for many of the costs associated with relocating your home to the Knoxville area.

As a relocating employee, you are reimbursed for those expenses associated with your relocation for which are recognized as both necessary and reasonable. For example, these expenses include transportation, house hunting, shipping of your possessions, trips home, settling in your new home, selling your old home, and acquiring a new home.

Keep in mind that, with the relocation assistance program, all aspects of your relocation process must be completed within 1 year from your date of employment or transfer. And, all reimbursement of expenses will stop if your employment is terminated.

To receive reimbursement for your expenses, you must complete the Relocation Expense Report (UCN-13A). Also remember that your reimbursement expenses must be submitted within 90 days of the date when these expenses incurred.

If you have questions about settling residential costs, be sure to contact the relocation administrator.

## 3.1 Home Acquistion Closing Costs

Closing costs associated with the purchase of a home at the new location are reimbursable if you are a homeowner at the time of accepting employment. Closing costs are reimbursable at a cap of 5% of the purchase price.

A copy of the signed or certified Housing and Urban Development (HUD) settlement statement is required for reimbursement of closing costs.

The closing on the new home must occur no later than 1 year after your report-to-work date.

Use the following list of common closing costs for purchasing a new residence to determine what is allowable and can be submitted for reimbursement.

Reimbursable receipted costs include but are not limited to the following:

- Appraisal fees
- Credit report fee
- Document preparation/review fees
- FedEx, fax, courier, postage charges
- Impact fees
- Inspection fees if customarily paid by buyer (structural, pest, asbestos, radon gas, etc.)
- Legal, attorney, notary fees (not including cost of litigation)
- Loan origination fees (not to exceed 1% of the mortgage)
- Recording fees
- Settlement/closing fees
- Survey fees
- Tax service fees
- Tax stamps
- Title abstract fees (search and examination)
- Title insurance (lender's mortgage coverage)
- Title insurance (owner's coverage, if carried by the relocating employee on the old residence); proof of previous coverage required

Unallowable costs not reimbursable include but are not limited to the following:

- Home warranty fees
- Loan discount points, discount fees, buy-down fees
- Litigation costs
- Property/mortgage insurance costs
- Real estate broker's fees and commissions
- Taxes
- Title insurance (owner's coverage, if not carried by the employee on the old residence)
- U.S. Department of Veterans Affairs (http://www.va.gov/) or Federal Housing Administration (http://portal.hud.gov/hudportal/HUD?src=/federal_housing_administration) discount points

## 3.2 Relocation Allowance

There are three options for receiving a relocation allowance from which you can choose.

***Option 1*** — A $1000 lump sum payment is allowable for leasing a residence for 12 months or longer at the new location. A copy of the signed lease must be provided for reimbursement. If a $1000 relocation allowance is received, an additional $1500 can be obtained with the purchase of a residence if the purchase is completed within the 1-year relocation period. A copy of a signed or certified Housing and Urban Development (HUD) settlement statement is required for reimbursement. See the HUD website (http://portal.hud.gov/hudportal/HUD) for more information.

***Option 2*** — A $2500 lump sum payment is allowable for purchasing a residence at the new location. A signed or certified copy of the HUD settlement statement must be provided for reimbursement. No other receipts are required for the $2500 lump sum option.

***Option 3*** — A relocation allowance up to $5000 is allowable with actual, receipted expenses. Examples of receipted expenses are disconnecting/connecting household appliances, automobile registration, driver's licenses and use tax, cutting/fitting carpets, window treatments, forfeited utility fees or deposits at the previous location, cleaning at the old and new locations, babysitter fees, kennel charges and pet fees, and trash removal.

## 3.3 Duplicate Homeowner Costs

Reimbursement for expenses incurred for the previous residence (which is being offered for sale and is unoccupied) is allowed after the settlement/lease date of a new, long-term residence. Duplicate homeowner costs cannot be reimbursed during the settling-in period.

Reimbursement of expenses is limited to 6 months from the date of settlement or lease of your new residence.

Reimbursement can be obtained by submitting a copy of the unexpired lease, an itemized list of expenses, and the supporting documentation showing payment of the expenses.

Duplicate homeowner reimbursements are included as part of the 14% of sale price maximum reimbursable expenses on your home sale.

Allowable expenses include the following:

- Maintenance of buildings/grounds
- Mortgage interest
- Property insurance
- Property taxes
- Utilities

Property management fees and property improvements are not allowable costs.

## 3.4 Settling an Unexpired Lease

Reimbursement for settling an unexpired lease at the previous location may include the monthly rent and broker's fees for advertising and subleasing the unexpired lease if all the following conditions are met:

- Applicable laws or terms of the lease provide for payment of settlement expenses.
- Expenses are not the result of failure to give the required termination notice promptly.
- Broker's fees or advertising fees are not excessive for that area.

Reimbursement can be obtained by submitting a copy of the unexpired lease, an itemized list of expenses, and the supporting documentation showing payment of the expenses. Expenses must be incurred and submitted within the 1-year relocation period.

## 3.5 Home Sale Closing Costs

We recommend that you not place your residence on the market until Human Resources has received your signed offer letter and the relocation administrator has received the signed Relocation Agreement (UCN-21434) (see Appendix).

For reimbursement of home sale closing costs, you must own and reside at the lot and structure at the time of accepting the offer of employment. Closing costs plus duplicate homeowner costs up to 14% of the sales contract price may be reimbursed.

A signed or certified copy of the Housing and Urban Development (HUD) settlement statement is required for reimbursement of allowed closing costs. See the HUD website (http://portal.hud.gov/hudportal/HUD) for more information.

Closing of the sale must occur no later than 1 year after you report to work.

Use the following list of common closing costs for the sale of a previous residence to determine what is allowable and can be submitted for reimbursement. Reimbursable receipted costs include but are not limited to the following:

- Advertising costs such as costs of newspaper, bulletin board, multiple-listing services, and other advertising for sale of residence, if employee has not paid for such services in the form of a broker's fee or real estate agent's commission
- Appraisal fees
- Document preparation/review fees
- FedEx, fax, courier, postage charges
- Inspection fees if customarily paid by seller (structural, pest, asbestos, radon gas, etc.)
- Legal, attorney, notary fees
- Mortgage and estate transfer taxes
- Mortgage pre-payment penalty
- Real estate commissions/brokerage fees
- Recording fees
- Settlement/closing fees

- Survey fees
- Title abstract fee (search and examination)
- Title insurance policy premium, in states where seller is required to pay and to the extent such costs have not been included in other residence transaction fees (documentation required from title company or real estate company)
- Transfer tax/fee imposed by law on the seller

Unallowable costs not reimbursable include but are not limited to the following:

- Costs of physical improvements intended to improve the condition or appearance of the previous residence
- Costs paid on behalf of the buyer
- Litigation fees
- Loss on the sale of the previous residence

## 3.6 Spousal Employment

Spousal employment assistance costs are reimbursable up to $1000. Reimbursement is obtained by submitting actual receipted items along with a Relocation Expense Report (UCN-13A) (see Appendix A). Receipted items may include the following:

- Career counseling assistance
- Certification fees
- Employment agency fees
- Printing and mailing fees
- Résumé preparation
- Testing fees

## 3.7 Tax Assistance

Certain relocation expenses are considered taxable income to you, the employee. Y-12 is required to report all relocation payments as compensation with the following exceptions:

- Reasonable and normal expense resulting from household goods shipments
- Up to 30 days of household goods storage while waiting to occupy a residence at the new location
- Reasonable and normal expenses for transportation and lodging for you and eligible dependents from your old work location to new work location (en route expenses)

Y-12 will assist in paying the additional income tax, Federal Income Contributions Act (FICA) tax, and Medicare tax that result from taxable relocation payments, excluding deductible expenses. More information on the FICA and Medicare taxes can be found at Wikipedia (http://en.wikipedia.org/wiki/Federal_Insurance_Contributions_Act_tax) and IRS (http://www.irs.gov/Individuals/International-Taxpayers/Social-Security-Tax---Medicare-Tax-and-Self-Employment).

The tax assistance provided to you is based solely on your Y-12 annualized salary, tax filing status, and number of W-4 exemptions.

We recommend that you seek guidance from a tax professional for any year in which you receive relocation assistance.

# 4. RELOCATION FORMS

Just two forms (see Appendix) are used in the relocation process:

- The Relocation Agreement, UCN-21434 (Word), completed by all new relocating employees, is the first step in starting the relocation process.
- The Relocation Expense Report, UCN-13A (PDF), must be completed so that costs associated with relocation—such as lodging, rental car, airfare, meals, and incidentals—can be reimbursed to you. The Y-12 Travel Services department can provide you with a corporate charge card that can be used as an option to pay for relocation costs.

See Sect. 2.3 for a few details to keep in mind when completing your Relocation Expense Reports. If you have questions, your relocation administrator is a great resource for completing your Relocation Expense Reports.

# 5. FREQUENTLY ASKED QUESTIONS

Frequently asked questions and their answers are presented below by topic.

**Initiating the Relocation Process (for more information, see Sect. 2)**

- How do I know if I am eligible for relocation assistance?

  The Human Resources staffing associate determines eligibility for relocation assistance before extending an offer for employment.

- Who is my main point of contact regarding relocation assistance at Y-12?

  The relocation administrator.

- When does the relocation assistance process begin?

  The relocation assistance process will begin after you have accepted an offer for employment, pending background check, drug screen and pre-employment medical exam.

- What is the first step in the relocation assistance process?

  After receiving notification from Human Resources Staffing, the relocation administrator will contact you to start the relocation process and to complete the required relocation forms.

**House-Hunting Trip (for more information, see Sect. 2.4)**

- Am I allowed a house-hunting trip?

  Yes, you are allowed one house-hunting trip for a maximum of 10 days. The house-hunting trip can be combined with the trip to complete the pre-employment medical exam and drug screen.

- What do I have to do to take a house-hunting trip?

  Contact the relocation administrator. Your house-hunting trip must be approved in advance by the relocation administrator. The relocation administrator will make any travel arrangements, such as airfare, lodging, rental car, etc.

- Who is allowed to travel on my house-hunting trip?

  A house-hunting trip can be made by either the employee only, employee and spouse, or spouse only.

- How are the costs of a house-hunting trip paid?

  You are responsible for paying costs for lodging, rental car, meals, etc., of your house-hunting trip and then submitting receipts for reimbursement. Traveling costs, such as airfare, are paid directly by Y-12 on your behalf.

**Moving Household Belongings (for more information, see Sect. 2.5)**

- How do I move my household belongings?

  You have two options. Your assistance and reimbursement are limited to your choosing one option. The two options are:

  Option 1 — self-move
  Option 2 — Y-12 Transportation move

- If I choose the self-move option, what is covered?

  Under the self-move option, you can be reimbursed for the cost of a rental truck from place of origin to your new assignment destination, fuel costs for the rental truck from origin to new assignment destination, and miscellaneous packing materials such as boxes, pads, tape, etc. You are responsible for paying the costs and then submitting receipts for reimbursement.

- How do I proceed with the Y-12 Transportation move option?

  You will be assigned a contact from the Y-12 Transportation department. This contact will arrange for a commercial moving company to work with you to begin the process of moving your household belongings. You will be responsible for coordinating the packing of your belongings.

- What is the weight limit for shipping household belongings under the Y-12 Transportation move option?

  The weight limit is 18,000 lb. You are responsible for paying any transportation costs for weight exceeding 18,000 lb.

- How is the Y-12 Transportation move option paid for?

  The commercial moving company assigned to move your belongings will bill Y-12 Transportation directly for the total allowable costs. You will be responsible for arranging payment directly with the moving company for any unallowable costs.

**Shipping/Driving Personal Vehicles (for more information, see Sect. 2.6)**

- How many personal vehicles are covered under Y-12 relocation assistance?

  Two personal vehicles

- Am I allowed to ship my personal vehicle?

  Yes, you can ship one personal vehicle either through arrangements with Y-12 Transportation, arrangements with the moving company assigned to you or arrangements you make on your own.

# 6. CONTACT US

Your relocation administrator:

Emily Gray
B&W Y-12
P.O. Box 2009, MS 8265
Oak Ridge, TN 37831
Phone: 865.241.3996
Fax: 865.576.5717

# APPENDIX

# RELOCATION AGREEMENT

The Relocation Agreement, UCN-21434, is available in Word-fillable format at http://www.y12.doe.gov/library/forms/miscellaneous-forms.

B&W Y-12 technical services LLC

## Relocation Agreement and Disclosure Agreement

| TO BE COMPLETED BY STAFFING | |
|---|---|
| EMPLOYMENT DATE OR TRANSFER DATE | |
| HIRE STATUS | BADGE NO. |

**TO BE COMPLETED BY EMPLOYEE**

| PRINTED NAME | | |
|---|---|---|
| PHONE – WORK | PHONE – HOME | PHONE – CELL |

| FAMILY STATUS | SPOUSE'S NAME OR DOMESTIC PARTNER'S NAME |
|---|---|
| ☐ MARRIED ☐ NOT MARRIED ☐ DOMESTIC PARTNER | |

| CHILDREN | | | | |
|---|---|---|---|---|
| | NAME | AGE | NAME | AGE |
| | NAME | AGE | NAME | AGE |
| | NAME | AGE | NAME | AGE |

| CURRENT HOMEOWNER? | TEMPORARY LODGING NEEDED UPON ARRIVAL? |
|---|---|
| ☐ YES ☐ NO | ☐ YES ☐ NO |
| HOMEOWNER INFORMATION<br>PRINCIPLE RESIDENCE<br>☐ YES ☐ NO<br>ESTIMATED MARKET VALUE: $ | ADDRESS MOVING FROM<br>CURRENT ADDRESS *(IF DIFFERENT)* |

I understand and agree that I am responsible for payment of any excess moving and storage charges incurred by me over and above the authorized limitations allowed by Company policy at the time of my relocation. I further understand and agree that any such excess charges shall be billed directly to me by the moving and/or storage company.

It is further understood and agreed by me that if I am terminated for cause within one (1) year from the effective employment date or transfer date, I shall promptly reimburse B&W Y-12 relocation monies paid to or for me by the Company. This amount is to be deducted from any sum due me by the Company at the time of termination of employment, if I have not made repayment. If the sum due me is insufficient to cover the entire amount owed, I agree to pay upon demand to the Company, the remaining balance.

If I voluntarily terminate or otherwise leave my employment for reasons within my own control within one (1) year from the effective employment date or transfer date, I shall promptly reimburse B&W Y-12 all relocation monies paid to or for me by the Company. This amount is to be deducted from any sum due me by the Company at the time of termination of employment, if I have not made repayment. If the sum due me is insufficient to cover the entire amount owed, I agree to pay upon demand to the Company, the remaining balance.

I hereby acknowledge receipt of a copy of the B&W Y-12's relocation policy.

I fully understand that the foregoing is not intended as a contract of employment for any period.

I agree that I and/or my immediate family have not accepted, and will not accept, duplicate reimbursement for relocation expenses. Furthermore, I confirm, to the best of my knowledge, that no third party has accepted duplicate reimbursement for my relocation expenses.

| SIGNATURE | DATE |
|---|---|
| | |

UCN-21434 (06-12)

**OFFICIAL USE ONLY**

**OFFICIAL USE ONLY**
May be exempt from public release under the Freedom of Information Act (5 U.S.C. 552), exemption number and Category: 6, Personal Privacy.
Department of Energy review required before public release.
Name/Org.: Ted Reilly/CFO Date: 06-27-12

# RELOCATION EXPENSE REPORT

The Relocation Expense Report, UCN-13A, is available in PDF-fillable format and as a print only file at at http://www.y12.doe.gov/library/forms/miscellaneous-forms.

B&W Y-12 technical services LLC

## RELOCATION EXPENSE REPORT

| NAME | EMPLOYEE NO. | PERIOD OF THIS REPORT FROM TO | T.A. NO. |
|---|---|---|---|
| | | | |

| 1. DAY | SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY |
|---|---|---|---|---|---|---|---|
| 2. DATE | | | | | | | |
| 3. FROM: | | | | | | | |
| TO: | | | | | | | |
| TO: | | | | | | | |

**4. PURPOSE**

- ☐ 1. Inbound Travel
- ☐ 2. Shipment of Household Goods
- ☐ 3. Storage of Household Goods
- ☐ 4a. House-Hunting Trip
- ☐ 4b. Spouse's House-Hunting Trip
- ☐ 5. Settling-In
- ☐ 6a. Home Acquisition
- ☐ 6b. Home Sale
- ☐ 7. Trip(s) Home
- ☐ 8. Relocation Allowance
- ☐ 9. Duplicate Homeowner Allowance
- ☐ 10. Lease Termination
- ☐ 11. Miscellaneous/Other *(Explain.)*

**EXPLANATION**

| TRANSPORTATION | SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY | TOTAL |
|---|---|---|---|---|---|---|---|---|
| 5. Plane Tickets | | | | | | | | 0 |
| 6. Personal Car | | | | | | | | 0 |
| 7. Rental Car | | | | | | | | 0 |
| 8. Taxis, Tolls, Parking | | | | | | | | 0 |
| **LODGING/PHONE/MEALS** | **SUNDAY** | **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURSDAY** | **FRIDAY** | **SATURDAY** | **TOTAL** |
| 9. Hotel/Motel/Rent | | | | | | | | 0 |
| 10. Telephone | | | | | | | | 0 |
| 11. M&IE Inbound Travel | | | | | | | | 0 |
| **OTHER EXPENSES** | **SUNDAY** | **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURSDAY** | **FRIDAY** | **SATURDAY** | **TOTAL** |
| 12. Household Goods Shipment | | | | | | | | 0 |
| 13. Household Storage | | | | | | | | 0 |
| 14. Home Acquisition | | | | | | | | 0 |
| 15. Home Sale | | | | | | | | 0 |
| 16. Relocation Allowance | | | | | | | | 0 |
| 17. Lease Termination | | | | | | | | 0 |
| 18. Duplicate Homeowner Allowance | | | | | | | | 0 |
| 19. M&IE Settling In | | | | | | | | 0 |
| 20. | | | | | | | | 0 |
| **21. Daily Report Total** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |

UCN-13A (12-08)

**STATEMENT OF EXPENSE**

| | | |
|---|---|---|
| 22. Total Expense This Report *(From Line No. 21)* | | 0 |
| **RECEIVED** | *IMPORTANT - Enter negative values with a minus (-) sign.* | |
| 23. Plane Tickets Furnished by Company | | *Enter value of line 25 as negative number on line 26.* |
| 24. (Deduct) Tickets Returned for Credit | ( ) | |
| 25. Subtotal Tickets Used (Lines 23-24) | 0 | |
| 26. (Deduct) Total Plane Tickets Purchased by Company | | ( ) |
| 27. (Deduct) Other Expenses *(Explain below.)* | | ( ) |
| **28. BALANCE THIS REPORT** | | 0 |

**29. I certify that the foregoing is a true statement of expense incurred in accordance with Company practice and instructions.**

30. REQUESTER'S SIGNATURE DATE

31. APPROVED DATE

32. SEND CHECK TO

33. ACCOUNT CHARGE

**FURTHER EXPLANATION OF EXPENSES**