

# New Regular Hire Relocation Travel Information Packet

This information packet is provided by the CFO Travel Relocation Office to assist you in planning your relocation to Los Alamos. If you have additional questions, you can contact the Relocation Office at (505) 665-4484 or by e-mail at [relocation@lanl.gov](mailto:relocation@lanl.gov). Once you have completed the hire on process, please contact the Relocation Office for instructions for completing your reimbursement.

You must have met all contingencies, if any, of your hire as well as have proper work authorization before the Relocation Office can authorize or reimburse expenses. If you have not received or signed your offer letter and returned it to your Human Resources Generalist, you should not depart for Los Alamos. Expenses incurred prior to signing the offer letter and returning it to HR are **not** reimbursable. ***The signed relocation agreement must also be returned to the Relocation office before your household goods shipment can be authorized.***

The Relocation Office receives your relocation information from your Human Resources Generalist. For situations not mentioned in this packet, please contact your Human Resources Generalist.

## **I. Point of Hire**

The Human Resources Division establishes a point of hire for the purpose of determining the maximum distance for which travel costs are reimbursed. Your point of hire is usually the address where your offer letter was sent. If this is not the location that you are relocating from, you will need to contact your HR Generalist.

If you elect to travel from a point other than the established point of hire or by an indirect route, reimbursement will be made for actual allowable charges not to exceed the charges normally allowed between the point of hire and the Laboratory.

If you are traveling from a location other than the established point of hire, please contact your Human Resources Generalist.

## **II. Employment Contingencies**

### **Drug Testing**

All new hires must complete a drug test within 15 days of starting employment at LANL. Any expenses that are reimbursed prior to the completion of the drug test, including payment of household goods shipment must be reimbursed to LANL if the test is not successfully completed. No additional reimbursement will be provided.

### **VISA – Non-US Citizen**

Appropriate work authorization must be obtained prior to the Laboratory committing any funds for your relocation expenses. Please contact the Immigration Services Office at (505) 667-8650 or by email at [immigration@lanl.gov](mailto:immigration@lanl.gov) to ensure a proper visa is obtained. You should also advise the Relocation office of any pending authorization.

## **III. Income Tax on Relocation Reimbursement**

Per IRS regulations, the reimbursement of expenses to the employee will be on the employee's W-2 form. Per IRS Publication 521 - Moving Expenses, the expenses subject to withholding, include house hunting trip, settling in allowance, residence relocation allowance, temporary storage of household goods exceeding 30 days and the inbound meal allowances.

Tax assistance is provided for expenses subject to tax withholding to offset taxes withheld on relocation expenses. The reimbursement payment will be based upon standard reimbursement rates and therefore will not be an exact match of taxes withheld. See *“What is Gross Up?” form included with your relocation information.*

Relocating employees are responsible for filing their own tax returns and are advised to consult their own tax advisors on these matters.

***For specific tax questions, please consult current Internal Revenue Service regulations.***

## **IV. Travel Arrangements**

### **1. AIR TRAVEL**

If you are traveling by air, the closest major airport to Los Alamos is the Albuquerque Sunport; flight arrangements should be made to Albuquerque. There is a small airport in Santa Fe, but it does not offer service to all airlines. If a flight is available from your local airport to Santa Fe, it is allowable to arrange a flight to Santa Fe.

#### **“FLY AMERICA ACT”**

**Federal Travel regulations require that all employees traveling to/from a foreign country must use a US Flag carrier for air travel. US Flag carriers include United, American, Continental and Delta Airlines. There are foreign carriers which have agreements with US carriers for flights, but your ticket must indicate the US Company in order for you to be reimbursed for your airline ticket.**

#### **Airline Tickets**

You must purchase your own tickets. When purchasing your tickets you may book directly with the airline or you may use an internet provider such as Expedia or Orbitz for the airfare only (not for lodging; see **V. Lodging**).

If you will be travelling from a foreign country and choose to have the Travel Office make your reservations, please contact the Relocation Office. NOTE: airline tickets cannot be issued for house-hunting trips/they are issued for in-bound travel only.) You must have a Z number (employee ID number) assigned to you before the Laboratory can issue your tickets. If you are not sure whether or not you have been assigned a Z number, please contact your HR Generalist. You will need to provide the following information for the Travel Reservations team in order for tickets to be issued:

- \*Date of travel
- \*Preferred flight time
- \*Names of all family members – must match the form of identification used at airport security
- \*Ages of children
- \*Credit card information
- \*E-mail address (either your personal address or your Laboratory contact)

#### **Travel from the Airport to Los Alamos**

Transportation from Albuquerque or Santa Fe can be completed by rental car or by shuttle bus. Rental cars can be picked up in Albuquerque and returned in Los Alamos. The Laboratory currently has a contract with Hertz, the contract number is 72120. (Please be aware there is no longer a Hertz office in Los Alamos so the return would need to be made in Santa Fe). The Laboratory also has contracts with National and Enterprise, the contract number is XZ34001 for both. There is a drop off location for these two agencies in Los Alamos. Reservations should be made for an intermediate size vehicle. These contracts cover you for CDW or LDW insurance so you do not need to accept these insurances. There is one shuttle bus service providing ground transportation from Albuquerque to Los Alamos: Roadrunner Shuttle (505-424-3367). There is no taxi service in Los Alamos. However, there is a local bus service that can transport you from your hotel to the Laboratory, if needed. The service is provided by Atomic City Transit (505-662-2080).

#### **Canceled Reservations**

Charges incurred if you fail to cancel reservations within the specified time limits are not normally reimbursable.

## **2. RAIL OR BUS**

Rail or bus travel is considered to be for personal convenience.

When travel by railroad or bus is used instead of available air travel for the personal convenience of the traveler, reimbursement for travel cost is limited to the fare that the Laboratory would have paid if travel had been by air plus a ground transportation allowance or actual ticket cost, whichever is less. The cost of meals and lodging while in transit are not reimbursed.

### **Canceled Reservations**

Charges incurred if you fail to cancel reservations within specified time limits are normally not reimbursable.

## **3. PRIVATE AUTOMOBILE**

Reimbursement is provided for driving or transporting a maximum of two automobiles.

### **Driving Your Private Automobile**

The allowance is based on the Rand McNally Standard mileage guide between authorized points by the most direct route. The mileage allowance is for the use of the automobile and applies regardless of the number of persons traveling in it. Private vehicle mileage is reimbursed at the IRS-approved *moving* rate per mile.

Other costs such as maintenance and repairs are not reimbursable.

### **Shipping Your Private Automobile**

Please advise your selected household goods carrier when making arrangements if you will be shipping one or more privately owned vehicles.

### **Toll and Parking Charges**

Necessary ferry, bridge, tunnel or road toll charges are allowed in addition to the mileage allowance. You will also be reimbursed for necessary parking or garage charges. Receipts are required if the daily charge is \$75.00 or more.

## **4. PRIVATE AIRCRAFT**

Private aircraft will not be authorized for travel, nor will any reimbursement be made for use of a private aircraft.

## **V. Lodging**

The Laboratory does not require that you stay in specific hotels; however, your reimbursement is limited to the amount that is allowed for Los Alamos County based on GSA rates. If you choose to stay in Santa Fe or the surrounding area, you may not be fully reimbursed for your lodging.

*Please do **not** use internet sites such as Hotels.com, Expedia or Orbitz to make your lodging arrangements! Itemized receipts from the hotel are required for reimbursement; hotels cannot provide an itemized receipt if an internet site is used for booking.*

## **VI. Relocation Allowance**

This allowance is intended to cover any additional expenses you incur outside of your en route, temporary living or shipping expenses. Expenses that this allowance is intended for, can be found at: [http://www.lanl.gov/careers/employees-retirees/travel/\\_assets/docs/relocation-travel-regular-hires-tr9007.pdf](http://www.lanl.gov/careers/employees-retirees/travel/_assets/docs/relocation-travel-regular-hires-tr9007.pdf)

## **VII. Reimbursement of Expenses and Required Receipts**

**Please see Attachment A for a list of required receipts. Reimbursements are issued by the Payroll and are usually included in the next paycheck after expenses are submitted.**

## **VIII. Household Goods Shipping Arrangements**

You must have met all contingencies, if any, of your hire as well as have proper work authorization before the Relocation Office can send the Authorization of Services to the selected carrier. The Relocation Agreement must be sent to [relocation@lanl.gov](mailto:relocation@lanl.gov) prior to making any arrangements with the carrier.

**\*\*Please refer to section IX. Laboratory-Approved Carriers below for detailed instructions regarding the process to set up the household goods shipment prior to setting anything up with a carrier. \*\***

### **Time Limitation**

All household goods shipments must be completed within two years of the employee's date of hire.

### **Subsequent Moves**

Transportation of household goods is generally limited to one shipment. Subsequent relocation costs are not covered should you, for example, find closer or more suitable housing after having made your initial move. Should closer housing be secured at a later date, the cost of relocating in such an instance is not reimbursable.

### **Weight Limit**

Household goods shipments are limited to 18,000 pounds. If you have professional items to ship such as books or papers, please let the representative know not to include those items in the 18,000 pound limit. Professional items are defined as books and/or papers that will be needed for the new work assignment. Office furniture such as desks or file cabinets are not considered professional items.

### **Items Not Allowed**

Household goods shall not include wines, liquors, birds, pets, livestock, boats, canoes, kayaks, trailers, motorcycles, similar motor vehicles, airplanes, cordwood, building material or property belonging to any person other than yourself or your family. In addition, the Laboratory will assume no liability for loss, damage, or additional expenses caused by shipment of perishable items, including plants.

### **Packing and Unpacking**

The actual costs of normal packing, crating, unpacking, and uncrating are allowed, subject to the weight limitation. One debris pick up is authorized within 30 days of your household goods being delivered to your residence. Carton deliveries are not authorized. Unpacking is defined as the removal of household goods from cartons that were packed by the moving company and is not recommended by LANL. The moving company will place these items on a flat visible area such as a table or counter top. The moving company will then remove the debris and empty cartons from your residence. Should you want unpacking, notify the relocation service provider to make arrangements for an unpacking crew to be assigned to your move.

### **Overtime Charges and Special Services**

Charges for premium overtime, holiday or weekend loading or unloading labor requested by you for your convenience are not allowed.

### **Disconnecting and Connecting of Appliances and Furnishings**

**LANL will reimburse for disconnecting and connecting gas appliances only.** Should your carrier deem it necessary to have a third party perform the service, reasonable costs will be allowed; receipts are required. Maintenance costs are not reimbursable.

### **Temporary Storage**

Reimbursement is permitted for storage of household goods up to the specified weight limit, subject to the following limitations:

\*Temporary storage period must not exceed 90 days

\*Temporary storage is normally at one location only

\*When the total storage period exceeds 90 days, charges for taking the goods out of storage (such as dock handling, local transportation, or drayage charges) are reimbursable

\*Charges associated with permanent storage (such as mothproofing, additional insurance, or additional packing after reaching storage) are not reimbursable

### **Valuation for Shipping**

The Laboratory relocation policy allows you to value your shipment at \$10/pound. Any amount over the \$10/pound cannot be paid by the Laboratory. For example, if your shipment weighs 5,000 pounds, your maximum value would be \$50,000. If you have questions regarding the value of your shipment, please ask the carrier agent.

## **IX. Laboratory-Approved Carriers**

All shipments paid by the Laboratory must be arranged with the agents listed below. These agents are Laboratory-approved carriers based on cost and performance. By using one of the Laboratory approved agents, the cost will be billed to the Laboratory and your shipment will be insured at \$10/pound. Please feel free to contact these carriers prior to contacting the Relocation Office if you feel you need more information before selecting a carrier.

**\*\*Once you have made your selection and before scheduling anything with the carrier, please send an email to the relocation office ([relocation@lanl.gov](mailto:relocation@lanl.gov)) so that the shipment approval process can begin. Include the following information in your e-mail:**

**Name of carrier you selected for the move:**

**Address you are moving from:**

**Date you would like to move:**

**Daytime contact phone number:**

**We will forward this information to the carrier along with the approval for the carrier to bill LANL directly for the shipment, they will then contact you to set up the details for the shipment. \*\***

The following carriers are able to provide service within the state of New Mexico, within the continental United States, and from foreign countries to the United States:

### **Laboratory Approved Agents**

### **National Affiliation**

Buehler Companies  
2525 Broadway SE  
Albuquerque, NM 87102  
505-344-3494 Office  
505-559-4206 Cellphone  
800-333-3494 Toll free  
Contact: Dorothy Romero-Montoya

Mayflower Transit

Albuquerque Movers, Inc.  
1600 First St. NW  
Albuquerque, NM 87102  
505-831-8000 Office  
800-344-9668 Toll Free  
Contact: Brad Killman/Jason Shafer

Graebel Van Lines

Johnson Southwest Moving Systems  
02 Paseo De River

United Van Lines

Santa Fe, NM 87507  
505-577-7023 Cellphone  
800-876-6683 Toll Free  
Contact: Lorrie Alvarado

**Note:**

If you choose to make your own arrangements using another carrier, your reimbursement will be limited to the lesser of your actual cost or the cost of using one of the Laboratory agents. The following documentation is required for reimbursement: Bill of lading showing the weight of the shipment, the pick-up date and the delivery date, copy of a certified check, personal check or credit card receipt showing full payment to the carrier, carriers inventory showing that no unallowable items are included in the cost.

## ATTACHMENT A

## REQUIRED RECEIPTS

## HOUSEHUNTING

- Airline ticket receipt showing flights and method of payment
- Itemized lodging receipts
- Itemized rental car receipts

## EN ROUTE

- Airline ticket receipt showing flights and method of payment
- Itemized lodging receipts
- Itemized rental car receipts
- Itemized shipping receipts showing weight and cost

## SETTLING IN

- Itemized lodging receipts

## HOUSEHOLD GOODS PAID BY EMPLOYEE

- Weight certificates showing empty weight and full weight of vehicle
- Itemized receipts for packing materials
- Itemized storage receipts showing cost and term of storage

## DEFERRED PACK AND LOAD

- Airline ticket receipt showing flights and method of payment
- Itemized lodging receipts
- Itemized rental car receipts

## HOME SALE

- Final closing documents (Closing disclosure is not considered a final closing document) with all signatures
- Itemized receipts for expenses paid outside of closing

## HOME PURCHASE

- Final closing documents (Closing disclosure is not considered a final closing document) with all signatures
- Itemized receipts for expenses paid outside of closing

## DUPLICATE HOMEOWNER

- Copy of Real Estate Contract to include date where principal residence was placed for sale and sales price (submit once)
- Copy of receipt or schedule that shows interest by month on mortgage loan(s)
- Copy of current home owners insurance bill even if paid by mortgage company (usually only once)
- Copy of most recent tax bills even if paid by mortgage company (usually only once)
- Copy of electric bill - no proof of payment required
- Copy of gas heating/cooling bill - no proof of payment required
- Copy of water bill - no proof of payment required
- Home Owner Association - copy of invoice or covenant requiring membership
- Copy of waste removal bill - no proof of payment required
- Lawn/grounds care - proof of payment is required (if cash signed receipt)
- Certain house maintenance/periodic cleaning - proof of payment is required

Regional/local circumstance may allow for additional items to be covered under duplicate homeowner reimbursement. These will be reviewed on a case by case basis. Proof of payment may be required.

**Note:**

Due to differences in the way mortgage companies and lending institutions handle items allowed in escrow accounts and minimum balances, normally the escrow statement alone will not be the basis for reimbursement of items other than interest. Proof of payment can be a cancelled check or receipt acknowledging payment

**SPOUSAL ASSISTANCE**

- Itemized receipt showing type of expense and cost

**LEASE BREAKING FEE**

- Letter or itemized breakdown of cost paid to Landlord/Management Company
- Proof of payment