

HSTA - Home Service Transfer Allowance Worksheet (DSSR 250)

Allowable expenses under the Home Service Transfer Allowance are calculated here to process a claim on the SF-1190. This worksheet is reproducible locally. See guidelines on the reverse side of this page.

1. Employee name (Last, First, MI)	2. Agency
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3. Miscellaneous expense portion		
<input type="checkbox"/> Flat rate (no receipts required) <input type="checkbox"/> Without family \$750 <input type="checkbox"/> With family \$1,500	<i>or</i>	<input type="checkbox"/> Itemize (DSSR 251.2a, receipts required) <input type="checkbox"/> Without family: lesser of one week's salary or GS-13, step 10 <input type="checkbox"/> With family: lesser of two weeks' salary or GS-13, step 10

4. Wardrobe expense portion Previous/next post & transfer zone _____	
Current post & transfer zone _____	
Employee w/o family _____ Employee with one family member _____ Employee with two or more family members _____	

5. Subsistence expense portion	
a. Under <u>Flat rate method</u> , use per diem rate for U.S. post of assignment: _____	
b. Under <u>Actual subsistence method</u> , use CONUS per diem rate if transferring to within the 48 contiguous United States or District of Columbia.	
If transferring to non-foreign, outside CONUS location (DSSR 251.1c), use per diem for that non-foreign location: _____	

⇒ **Flat rate method:** Limit of 30 days with no extensions, agency may limit to fewer days. No supporting documentation need be submitted. Agency should verify occupancy of temporary quarters and may require employee to keep receipts. Daily amount (percentage of U.S. post of assignment per diem): Initial occupant 75%; each additional occupant 25%

⇒ **Actual subsistence method:**
 Days 1 through 30: Occupant(s) x Percentage allowed = Maximum allowed

Initial occupant	1	100% of Per Diem	\$
Family members 12 & over		75% of Per Diem	\$
Family members under 12		50% of Per Diem	\$
Maximum daily family rate			\$

Days 31 through 60 (and days 61 through 120 with agency approval):

Occupant(s) x Percentage allowed = Maximum allowed

Initial occupant	1	75% of Per Diem	\$
Family members 12 & over		50% of Per Diem	\$
Family members under 12		40% of Per Diem	\$
Maximum daily family rate			\$

Sample of worksheet for actual subsistence method. Claim should be for 30 day periods. Taxes on lodging may be reimbursed in addition to maximums under actual subsistence method only – not under flat rate method.

Date	(A) Lodging	(B) Per Day Meal/Laundry/Dry Cleaning Statement	(C) Total per day (A+B)	(D) Maximum daily family rate	(E) Maximum daily allowable (lesser of C or D)

6. Lease penalty expense portion	
Lesser of: penalty per terms of lease _____ <i>or</i> three months' rent _____	
Authorizing official certifies the following: (a) the employee's transfer to the United States was due solely to actions by the employing agency and to unusual conditions fully beyond the control of the employee; and (b) the termination of the lease and departure of the employee did not result from any specific actions by the employee to seek a curtailment of the assignment for transfer or promotion; and (c) the employee was not negligent in promptly notifying the landlord of the intent to terminate the lease after receiving an official notice of transfer; and (d) all reasonable steps were taken by the employee to dispose of the quarters by sublease or assignment to others; and (e) both the employee and employing agency made reasonable efforts to avoid the full lease penalty by delaying the employee's transfer to the United States.	
Authorizing official's signature _____	Date _____

7. Remarks

8. Employee Certification Statement (see exception at DSSR 251.1b): In order to be eligible for a grant of the home service transfer allowance, I certify that I agree to complete 12 months in United States Government service following the effective date of my transfer to a post in the United States or other non-foreign area, unless separated for reasons beyond my control which are acceptable to my employing agency. Failure to comply will result in my liability for repayment of this allowance.	
Employee's signature _____	Date _____

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9. Guidelines for the Home Service Transfer Allowance:

- ⇒ See special definition for "United States" for this Chapter (DSSR 251.1c)
- ⇒ Employee must sign agreement to work twelve additional months for the Federal Government (252.5b-see exception at DSSR 251.1b)
- ⇒ Consists of four parts:
 - (a) Miscellaneous Expense Portion
 - (b) Wardrobe Expense Portion
 - (c) Subsistence Expense Portion
 - (d) Lease Penalty Expense Portion

_____ Miscellaneous Expense Portion:

- ⇒ Two ways to claim: (1) Flat rate or (2) Itemization
- ⇒ Flat rate: No receipts required \$750 without family; \$1,500 with family
- ⇒ Itemization: Receipts required. Limits are based on salary (DSSR 252.1). Allowable expenses listed in DSSR 251.2a
- ⇒ May be paid between foreign location and U.S.

_____ Wardrobe Expense Portion:

- ⇒ Paid only when transferring across two transfer zones (1 to 3 or 3 to 1)
- ⇒ May be paid between foreign location and certain non-foreign areas outside conterminous U.S.
- ⇒ Never paid to conterminous U.S. (48 contiguous states + the District of Columbia) which is zone 2
- ⇒ Zones for foreign areas found in DSSR 920, column 4
- ⇒ Zones for non-foreign areas found in DSSR 252.2
- ⇒ Paid as flat rate depending on family size, no receipts required (see DSSR 252.2 for current amounts)

_____ Subsistence Expense Portion:

- ⇒ Paid only when transferring from foreign post to the United States (DSSR 251.1c).
- ⇒ Paid by either Actual subsistence method or Flat rate method
 - If Agency offers both methods, then employee chooses method of reimbursement **prior to** commencement of HSTA.
 - If Agency does not offer both methods, Actual subsistence method is used.
- ⇒ Actual subsistence method: Paid up to 60 days with an additional 60 days allowed with agency approval; receipts required for lodging; certified meal/laundry/dry cleaning statement required, but no receipts.
- ⇒ Flat rate method: No receipts required, limited to 30 days

_____ Lease Penalty Expense Portion:

- ⇒ Paid from post in foreign area to United States
- ⇒ Authorizing official must certify in writing to five statements in DSSR 252.4
- ⇒ Amount allowed limited to terms of lease or three months' rent, whichever is less.