

U.S. Department of Energy

OAK RIDGE OPERATIONS

ORDER

**ORO O 550
CHAPTER I**

Date: 05-15-96

SUBJECT: TRAVEL POLICY AND PROCEDURES

1. PURPOSE. This Chapter correlates to DOE O 550.1 (formerly DOE 1500.2A), TRAVEL POLICY AND PROCEDURES, dated June 7, 1989, by assigning responsibility and accountability and providing administrative guidance to Oak Ridge Operations (ORO) and the Office of Scientific and Technical Information (OSTI). Nothing in this issuance changes any requirements in any DOE Order.
2. CANCELLATION. This Chapter cancels and replaces OR 1500.2, TRAVEL POLICY AND PROCEDURES, dated September 21, 1982.
3. APPLICABILITY. The provisions of this Chapter apply to ORO and OSTI Principal Staff and all Federal employees.
4. RESPONSIBILITIES.
 - a. ORO Chief Financial Officer (CFO) and OSTI Assistant Manager for Resource Management.
 - (1) Approve quarterly blanket orders where travel is expected to be frequent or upon short notice.
 - (2) Authorize and approve actual expense reimbursement of travelers.
 - (3) Approve exceptions concerning extended temporary duty travel (see Attachment 1 of this Chapter).
 - (4) Approve noncontract airline fares that exceed available contract airline fares.
 - b. Director, Financial Management Division (FMD).
 - (1) Performs those tasks identified in DOE O 550.1, subparagraphs 6d(3), (6), and (8)-(12).
 - (2) Reviews and approves DOE F 1520.1, "Employee Application for Reimbursement of Expenses Incurred Upon Sale or Purchase (or both) of Residence Upon Change of Official Station."
 - (3) Establishes and maintains programs and management systems that conform to the requirements of DOE O 550.1, Chapters II-VIII.

- c. Director, Personnel Division.
 - (1) Authorizes the extension of the 2-year limitation for settlement of residence sale, purchase, or lease transactions as described in DOE O 550.1, subparagraph 6d(14).
 - (2) Obtains travel and transportation information from prospective ORO and OSTI employees relating to the establishment of change of official station. Initiates DOE F 1510.7, "Authorization for Change of Official Station," when necessary.
 - (3) Administratively approves initial and amended DOE F 1510.7, including cases in which the reimbursement of previously incurred travel and transportation expenses is appropriate.
 - (4) Administratively approves SF-1038, "Application and Account for Advance of Funds," for advances against certain expenses for establishment or change of official station.
 - d. Director, Planning and Budget Division, performs that task identified in DOE O 550.1, subparagraph 6d(1).
 - e. Director, Waste Management and Technology Development Division.
 - (1) Provides guidance and technical assistance to prospective ORO, OSTI, and some Headquarters employees relating to the transportation of household goods during establishment of change of official station.
 - (2) Determines whether the commuted rate or actual expense method will be used for the transportation of household goods.
 - (3) Makes arrangements with a commercial carrier for transportation of household goods under the actual expense method.
 - f. ORO and OSTI Principal Staff.
 - (1) Perform those tasks identified in DOE O 550.1, subparagraphs 6d(2), (4), (5), (7), and (13); and Chapter II, subparagraph 1b.
 - (2) Establish the need for official travel by their employees.
 - (3) Authorize or approve per diem allowances for official travel that meet the criteria described in DOE O 550.1, Chapter IV, paragraph 1.
5. REQUIREMENTS AND PROCEDURES. Extended Temporary Duty (this type of assignment may or may not be considered an official detail).

The following requirements are provided to assist managers and travelers involved in extended temporary duty assignments. Prior to the beginning of a temporary duty assignment, employees are encouraged to consult with the ORO FMD travel staff. They are committed to assist in determining the most reasonable and cost-effective approach to travel needs. Traveling under multiple orders does not exempt an employee from these requirements. FMD will advise the traveler's assistant manager when there is an apparent abuse.

a. Reduction in Lodging and Meals and Incidental Expenses (M&IE) Per Diem After 30 Days.

When travel assignments involve extended periods of more than 30 days, travelers are normally able to secure lodging and meals at lower costs. Consequently, the M&IE rate will be reduced by a minimum of 25 percent after the first 30 days of duty. Lodging will continue to be reimbursed at actual not to exceed the maximum allowable rate. This statement must be included on the travel authorization unless an exception is authorized.

FMD will consider exceptions which would prevent the traveler from meeting this requirement. Consequently, all exceptions must be documented by a determination statement and incorporated as part of the employee's travel authorization, requested by the traveler's assistant manager, and approved by the CFO. Reductions in the M&IE rate will be automatic after 30 days.

b. Allowing Only One Authorized Trip Home Each 30 Days.

ORO authorizing officials may authorize, and travelers will be afforded, one authorized return trip home every 30 days while on extended temporary duty assignments over 30 days. Any exception must be documented by a cost analysis and determination statement as part of the travel authorization, requested by the traveler's assistant manager, and approved by the CFO.

ORO authorizing officials may require a traveler to return to his/her official station to conduct official Government business on either work or non-work days. If not originally documented on the traveler's authorization, an amendment must be issued, requested by the traveler's assistant manager, and approved by the CFO. While a required return will not affect the traveler's authorized returns once every 30 days during the extended temporary duty assignment, exceptions should be discouraged as not cost or business effective.

c. Employee Responsibility.

An employee traveling on official business is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of official business are not acceptable under this standard. Employees will be responsible for excess costs and any additional expenses incurred for personal preference or convenience (reference DOE O 550.1, Chapter IV, subparagraph 1c(3)(d)).

d. Documenting the Determination to Continue Temporary Duty Travel vs. Permanent Change of Station After 60 Days.

In situations where an employee is in travel status at the same location for an extended period over 60 days, the following applies. The head of the employee's organizational unit is required to submit to the authorized certifying official a determination statement, as part of the travel authorization process, showing why it is advantageous for the employee to continue in a travel status beyond 60 days rather than changing the employee's official duty station. After 60 days, no reimbursement will be made to the traveler until the determination statement is received.

6. REFERENCES. None.
7. DEFINITIONS. None.
8. CONTRACTOR REQUIREMENTS DOCUMENT. None.
9. ATTACHMENTS.

Attachment 1 - Determination Statement Supporting Continuing Temporary Duty Beyond 60 Days.

DATE

**DETERMINATION STATEMENT SUPPORTING CONTINUED
TEMPORARY DUTY BEYOND 60 DAYS**

It has been determined advantageous for (NAME) to be in an extended temporary duty status during the period (DATE), through (DATE), rather than implementing an official duty station change for the following reason(s):

- ___ The detail assignment to the (OFFICE/ORGANIZATION) has been and is currently a rotational assignment clearly established and limited to approximately (NUMBER OF DAYS).
- ___ The assigned detail was offered and accepted as a limited opportunity for professional and organizational development.
- ___ The detailed assignment does not relate to the employee's current duties assigned at Oak Ridge Operations (ORO).
- ___ The current position held at ORO is established and not slated for abolishment or refilling and is only available to the participant upon completion of the detail.
- ___ Based on the attached cost analysis it has been determined to be in the best financial interest of DOE for (NAME) to remain in an extended temporary duty status beyond (NUMBER OF DAYS).

CERTIFYING OFFICIAL NAME AND TITLE

CERTIFYING OFFICIAL ORGANIZATION