



George Deukmejian, Governor

O: PERSONNEL MANAGEMENT LIAISONS

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DATE OF ISSUE: April 27, 1988

THIS MEMORANDUM SHOULD BE DISTRIBUTED TO:

**ACCOUNTING OFFICERS
EMPLOYEE RELATIONS OFFICERS
HOLDERS OF THE SUPERVISOR'S TRAVEL GUIDE**

**SUBJECT: In-State Long-Term Assignments
(Supercedes Management Memo 86-31-1)**

The Department of Personnel Administration (DPA) is issuing the following instructions to be followed when departments consider long-term assignments (LTA). Additions and changes are indicated by vertical lines in the right margins; deletions are indicated by a horizontal line.

DEFINITION

A LTA is an assignment which exceeds 30 consecutive days at any one location. While they may not be compensable, trips to the employees' primary/permanent residence or headquarters on the employees' regularly scheduled day(s) off, vacation, administrative time off (ATO), compensating time off (CTO), sick leave, holidays, short-term travel assignments, personal trips or promotions do not interrupt the continuity of the LTA. The LTA terminates when an employee is assigned to another geographical area and terminates his/her long-term accommodations.

SUBSISTENCE RATES

The short-term subsistence rate normally may not exceed 30 consecutive days.

In instances where long-term accommodations are not readily available at the LTA location the appointing authority may extend the short-term subsistence rate beyond the authorized 30 days.

When employees locate "acceptable long-term accommodations"* near the job site payment of the short-term subsistence rate shall be discontinued.

*"acceptable long-term accommodations" near the job site are defined as acceptable accommodations as determined by the appointing authority.

In instances where long-term accommodations are readily available the appointing authority may reimburse employees at the long-term subsistence rate beginning the first day of the LTA.

DETERMINING LONG-TERM SUBSISTENCE RATES

The full long-term subsistence rate may be paid for each 24-hour period providing:

- The employees' primary/permanent residence is occupied by the employees' dependents or
- The employees' primary/permanent residence is being maintained at a net expense in excess of \$200.00 per month.

To qualify for this allowance, employees must provide substantiating evidence to the appointing authority. (SEE ATTACHED STD. FORM 653)

Any changes in the availability of the employee's primary/permanent residence may affect the long-term rate being claimed. Employees shall advise their Accounting Office of any change in status by filing an updated STD Form 653.

Employees on LTA not eligible for the full long-term subsistence rate will be allowed one-half the long-term subsistence rate rounded to the nearest whole dollar for each 24-hour period.

Allowances for partial days will be computed as follows:

- Less than 12 hours - one-half the appropriate allowance rounded to the nearest dollar.
- 12 to 24 hours - full allowance

TRANSPORTATION EXPENSES

Transportation expenses shall be allowed in the following instances:

- Between the employee's primary/permanent residence and the LTA location at the start and end of the assignment.
- When the appointing authority approves the employees return to headquarters.
- When the appointing authority has given prior approval to employees to return to their primary/permanent residence on regularly scheduled day(s) off, transportation expenses are allowed but no per diem shall be paid. (See PAYMENTS Section for exceptions)
- To commute daily to and from the LTA job site when no subsistence expenses are claimed requires appointing authority approval. Mileage shall be paid from the primary/permanent residence or headquarters whichever is less.
- In the conduct of official State business.

- Between living accommodations at the LTA location and the job site.

If employees choose not to stay at "acceptable long-term accommodations" nearest the job site, employees should only be reimbursed mileage to and from the "acceptable accommodations" nearest the job site.

- Between living accommodations at the LTA location and restaurants to obtain meals.

Mileage expenses claimed for meals should be allowed only to and from restaurants within a reasonable distance from either the job site or living accommodations.

- To and from a common carrier when authorized to return to the employees' primary/permanent residence or headquarters. Parking fees are allowed at the LTA location.

Employees who are assigned a State vehicle and use that vehicle on personal business (except the mileage between the LTA residence and LTA job site and to obtain meals) must have their supervisors' prior approval and make prior arrangements to reimburse the State for mileage expenses incurred. Reimbursement shall be at the mileage rate set by Fleet Management, Department of General Services.

PAYMENTS

Employees who remain at the LTA location on their day(s) off may claim the long-term subsistence rate (per diem) and transportation expenses to obtain meals.

Employees who return to their primary/permanent residence or headquarters on day(s) off may claim appropriate transportation expenses if the travel was pre-authorized. If travel is authorized, per diem shall be terminated at the end of the work shift or at the end of the subsistence day preceding the employees' day(s) off. Per diem will resume at the start of the shift when employees return to work.

Exceptions:

- Effective October 1, 1987, for employees in Bargaining Unit 9 and nonrepresented employees designated M09, S09 and C09, who, with supervisor's approval, are returning to their primary residence for day(s) off may remain at the LTA site overnight and regardless of the departure time the next day be authorized transportation expenses and an additional per diem allowance of \$23. Employees returning to their LTA site the day prior to the beginning of their workshift may be authorized transportation expenses and a full per diem allowance of \$46.
- Effective December 1, 1987, for employees in Bargaining Unit 11 and nonrepresented employees designated M11, S11, and C11 who, with supervisor's approval, are returning to their primary residence for day(s) off may remain at the LTA site overnight and regardless of the departure time the next day be authorized transportation expenses and an additional per diem allowance of \$23. Employees returning to their LTA site the day prior to the beginning of their work shift may be authorized transportation expenses and a full per diem allowance of \$46.
- Effective January 8, 1988, for employees in Bargaining Unit 12 and nonrepresented employees designated M12, S12 and C12 who, with supervisor's approval, are returning

to their primary residence for day(s) off may remain at the LTA site overnight and regardless of the departure time the next day be authorized transportation expenses and an additional per diem allowance of \$23. Employees returning to their LTA site the day prior to the beginning of their workshift may be authorized transportation expenses and a per diem allowance of \$23.

Employees who leave the LTA location on day(s) off for personal business and do not return to their primary/permanent residence or headquarters shall not receive per diem or transportation expenses.

Employees who leave the LTA location during the work week for personal business, may not claim per diem or transportation expenses. DPA Regulation Section 599.616(b)(1) prohibits employees from claiming per diem at their primary/permanent residence; therefore, the payment of per diem should be terminated when employees leave the LTA location. Per diem will resume at the start of the shift when employees return to work.

Employees who leave the LTA location on official State business for trips of less than 24 hours shall continue receiving the long-term subsistence rate but no short-term subsistence. If lodging expenses are incurred employees may claim short-term subsistence but no additional long-term subsistence.

Employees who leave the LTA location on official State business for trips of more than 24 hours shall receive only the short-term subsistence rate.

Employees may not claim long-term subsistence when using vacation, ATO or CTO in increments equal to or exceeding their normal work shift; or when using sick leave in excess of 3 days (Section 599.633 of the DPA regulations).

Employees may claim long-term subsistence when using vacation, ATO, CTO and sick leave in increments of less than their normal work shift.

Employees may claim long-term subsistence when the appointing authority enforces ordered ATO or CTO, for example, when the weather prohibits employees from performing their job duties.

DETERMINING LONG-TERM ASSIGNMENTS/RELOCATION

When the appointing authority is considering long-term assignments, the following factors should be taken into consideration and a cost analysis (SEE ATTACHED STD. FORM 654) filed with the Accounting Office:

- Length of the LTA.
- Cost of the subsistence allowances.
- Cost of the transportation expenses.
- Cost benefit between LTA and relocating employees.
- Feasibility of relocation.

COST OF LONG-TERM ASSIGNMENTS

The approximate cost of a one-year LTA where the new assignment is:

200 miles from headquarters	\$18,301.00
400 miles from headquarters	21,421.00

The following factors were used in computing these costs:

- \$41.00 a day subsistence allowance
- 313 days of subsistence (365 days less 52 days when transportation expenses are allowed on trips to residence/headquarters)
- 30 cents a mile transportation expenses (highest possible reimbursement rate)
- 26 round trips to residence/headquarters
- 200 miles from headquarters to LTA or
- 400 miles from headquarters to LTA
- 25 commute miles to work site and to obtain meals for 313 days

COST OF RELOCATION

The approximate cost of relocating an employee:

200 miles	\$16,870.00
400 miles	18,170.00

The following factors were used in computing these costs:

- Movement of 11,000 pounds of household goods
 - \$12.80 per 100 pounds to move 200 miles
 - \$16.55 per 100 pounds to move 400 miles
 - 14 percent fuel charge
 - storage in transit \$1.95 per 100 pounds for each 30 days
 - \$1,600.00 packing and miscellaneous
- 60 days statewide relocation allowance
- 200 miles to new headquarters or
- 400 miles to new headquarters
- \$200.00 miscellaneous expenses
- Sale of one residence at \$8,655.00.

Seller's costs of residence valued at \$110,000. Double this expense if the sale of a residence is anticipated upon the termination of the assignment.

EXCEPTIONS

The DPA must approve all LTA in advance, where the estimated cost of the LTA exceeds the estimated relocation costs. The following types of exceptions will be considered:

- LTA to remote locations
- LTA where positions are difficult to fill

The Director/designee of the appointing authority must approve the continuation of all assignments that exceed the original estimated completion date.

If the LTA is converted to a permanent assignment, long-term subsistence expenses should be discontinued. Employees may then be eligible for relocation expenses in accordance with Sections 599.714 - 599.724 of the DPA regulations.

If you have any questions concerning expenses for long-term assignments, please call Jan Sale at (916) 324-0439, ATSS 454-0439.



R. L. Rutherford, Manager
Personnel Services Branch

Attachments

LONG-TERM ASSIGNMENT (LTA) INFORMATION AND CERTIFICATION OF SUBSISTENCE RATES

STD. 853 (NEW 1-87)

(For definition of LTA and Privacy Notice see reverse side)

IMMEDIATE SUPERVISORS WILL SEE THAT THIS FORM IS COMPLETED BY EACH NEWLY-ASSIGNED EMPLOYEE AND REVIEWED QUARTERLY FOR OTHER EMPLOYEES. A NEW FORM MUST BE SUBMITTED WHENEVER THERE IS ANY CHANGE IN INFORMATION.

1. NAME (PRINT OR TYPE)	2. CIVIL SERVICE OR EXEMPT CLASSIFICATION	3. DESIGNATED HEADQUARTERS (HQ)
4. ADDRESS OF PRIMARY RESIDENCE		5. ADDRESS TO WHICH SALARY & EXPENSE CHECKS SHOULD BE SENT
6. NUMBER OF MILES BETWEEN THE FOLLOWING LOCATIONS HQ AND LTA LOCATIONS _____ PRIMARY RESIDENCE AND LTA LOCATION _____ LTA RESIDENCE AND LTA JOBSITE _____		
7. PURPOSE OF LTA	8. LOCATION OF LTA/JOBSITE (CITY)	9. DISTRICT
10. REPORTING DATE	11. ESTIMATED COMPLETION DATE	
12. RESIDENCE AT LTA LOCATION		

13. I HAVE THE FOLLOWING DEPENDENTS (AS DEFINED BY IRS STANDARDS):

NONE
 SPOUSE
 NUMBER OF CHILDREN
 PARENTS
 OTHER (PLEASE EXPLAIN ON REVERSE OF THIS SHEET)

14. DURING THIS ASSIGNMENT, MY DEPENDENTS WILL WILL NOT REMAIN AT MY PRIMARY RESIDENCE.

15. DURING THIS ASSIGNMENT, I WILL WILL NOT MAINTAIN MY PRIMARY RESIDENCE AT A NET EXPENSE TO ME IN EXCESS OF \$200 PER MONTH (AS OF 10/86).

17. If your primary residence will not be occupied by your dependents, list the average monthly expenses you will incur and attach supporting documents for Items A-F claimed. For example: rental agreement; utility bills.

A. Rent or Basic Mortgage Payment _____	\$ _____
B. Property Taxes _____	\$ _____
C. Fire Insurance, etc. _____	\$ _____
D. Utility Charges _____	\$ _____
E. Telephone Service at primary residence _____	\$ _____
F. Garbage, Water, Sewer _____	\$ _____
TOTAL COST PER MONTH (total of A-F) _____	\$ _____
Less monthly rental income (if primary residence is rented to others) _____	\$ _____
Net cost per month _____	\$ _____

The primary residence must be available to the employee upon the termination of the LTA. Child support and spousal support payments may not be included in the monthly expenses incurred. A deduction for depreciation is not allowed — a primary residence is not considered rental property.

I certify that the above information is correct, and I understand that if there is any change in any portion of the above, I must complete and submit a new form. I have read DPA Regulations 599.19 and 599.621 and I request the following subsistence allowance(s):

- No allowance.
- Short-term allowance until long-term accommodations are located (max. 30 consecutive days at the Department's discretion).
- Short-term allowance for more than 30 consecutive days. This requires the approval of Department Director or designee. Attach approval.
- Full Long-term allowance. Effective _____
- One-half long-term allowance. Effective _____

SIGNATURE OF EMPLOYEE _____	DATE _____	APPROVAL RECOMMENDED: <input type="checkbox"/> YES <input type="checkbox"/> NO	DATE _____
		SIGNATURE OF SUPERVISOR: _____	

FOR HEADQUARTERS USE ONLY

Subsistence Rate(s) approved:

Short-Term Rate \$ _____	Effective Date _____	Number of Days _____
Long-Term Rate \$ _____	Effective Date _____	

APPROVED BY DEPT. HEAD/DIV. CHIEF _____	DATE _____	APPROVED BY ACCOUNTING OFFICER _____	DATE _____
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DEFINITION

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PRIVACY NOTICE

INFORMATION REQUESTED IS MANDATORY. THIS INFORMATION IS USED TO DETERMINE THE PROPER SUBSISTENCE RATE AS PROVIDED UNDER DEPARTMENT OF PERSONNEL ADMINISTRATION REGULATIONS 599.619 AND 599.621. FAILURE TO PROVIDE ALL OR ANY PART OF SUCH INFORMATION WILL RESULT IN NONPAYMENT. THE PRINCIPAL PURPOSE OF THE REQUESTED INFORMATION IS TO ENSURE THAT THE PROPER SUBSISTENCE RATE IS APPLIED. NO KNOWN OR FORESEEABLE INTERAGENCY OR INTERGOVERNMENTAL TRANSFER OF COLLECTED INFORMATION EXISTS. DIRECT ANY INQUIRIES ON INFORMATION MAINTENANCE TO YOUR ACCOUNTING OFFICE.

LONG-TERM ASSIGNMENT COST ANALYSIS

STD. 854 (New 2-87)

EMPLOYEE	DIST-UNIT		
COST OF LONG-TERM ASSIGNMENT (LTA)		COST OF RELOCATION*	
1 YEAR \$ _____	2 YEARS \$ _____	1 YEAR \$ _____	2 YEARS \$ _____
		LONG-TERM ASSIGNMENT	RELOCATION
PER DIEM			
Number of days X long-term subsistence rate Length of assignment less number of days when transportation expenses are allowed for trips to primary residence		\$ _____	
<i>60 days X applicable relocation subsistence rate</i>			\$ _____
TRANSPORTATION COSTS			
Mileage rate X number of authorized round-trip miles to primary residence on normal days off		\$ _____	
Mileage rate X number of days X number of miles driven per day to work site and to obtain meals (Complete if state vehicle is not assigned)		\$ _____	
<i>Mileage rate X number of miles (One-way mileage for one privately-owned vehicle from old residence to new residence)</i>			\$ _____
MOVEMENT OF HOUSEHOLD GOODS			
<i>Estimated weight/costs (11,000 — 15,000 lbs. = \$2,500 — \$4,500 average)</i>			\$ _____
<i>Miscellaneous expenses (Maximum of \$200 with receipts)</i>			\$ _____
<i>Storage (\$1.95/100 lbs. for 30 days or fractional part (\$400 — \$500 average)</i>			\$ _____
SALE OF RESIDENCE			
<i>Estimated cost for sale of residence (Average seller's costs for a residence valued at \$100,000 is \$8,655)</i>			\$ _____
ESTIMATED RELOCATION COST			
<i>One way</i>			\$ _____ (One-Way)
<i>Round trip (Cost of relocation for 1-year assignment is the same as for 2-year assignment)</i>			\$ _____ (Round Trip)
ESTIMATED ONE-YEAR LTA COST (Multiply X 2 for cost of 2-year LTA)		\$ _____	

*Information/calculations are in italics.