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NASA Procedural Requirements

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30, 2013**COMPLIANCE IS MANDATORY**

Travel (w/change 3) dated September 12, 2011

Responsible Office: Office of the Chief Financial Officer

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Appendix A. NASA Federal Travel Regulations Supplement (NFTRS)

NPR 9700.1, Travel

Chg #	Date	Description/Comments
1	1/27/2009	Changes include additions to Appendix A to further clarify explanations so that travelers have a better understanding of the regulations as well as to accommodate the system's limitations of the new e-Travel system, and to outline the online process of applying for a Government travel charge card.
2	2/23/2010	Guidance in NPR 9700.1A, Appendix A, was revised related to travel issues, including electronic receipts (° 301-11.25), timing for reduce rate of reimbursement (° 301-11.205) and travel advance accounting and ATM issues (°301-51.204 & ° 301-71.305). Also mentioned is the potential tax liability to the traveler related to ° 301-10.22.
3	9/20/2011	NID 9312.89, Requirements Relating to Conference Attendance and Reporting, and NID 9312.72A, Requirements Relating to Conference Attendance, Obligations and Reporting, has been added as Chapter 2, added Chapter 2 to the Table of Contents, and updated Preface page with Authority and Measurement/Verification.

Preface

P.1 Purpose

This NASA Procedural Requirements (NPR) document provides the financial management and reporting requirements for travel, conference attendance, and conference sponsorship.

P.2 Applicability

This NPR is applicable to NASA Headquarters and NASA Centers, including Component Facilities and Technical and Service Support Centers. This language applies to the Jet Propulsion Laboratory (JPL) and to other contractors, grant recipients, and parties to agreements only as specified in the appropriate contracts, grants, or agreements.

P.3 Authority

- a. General Services Administration (GSA), Federal Travel Regulation (FTR).
- b. NASA Policy Directive (NPD) 9010.2, "Financial Management."
- c. NPD 9710.1V, Delegation of Authority - To Authorize or Approve Temporary Duty Travel on Official Business and Related Matters.

P.4 Applicable Documents

NASA Interim Directive (NID) 9312.2, Requirements Related to Conference Attendance, Obligations, and Expenditures (for adjustments to FY 2009 appropriated funds).

P.5 Measurement/Verification

Quality assurance reviews and analysis of financial and budgetary reports and data submitted through the continuous monitoring program are used to measure compliance with this NPR.

P.6 Cancellation

NM 9312-89, Requirements Relating to Conference Attendance and Reporting.

/S/

Terry Bowie
NASA Deputy Chief Financial Officer

Chapter 1. Travel

1.1 Overview

1.1.1 The National Aeronautics and Space Administration (NASA) travel management policies seek to improve the management and systems utilized by federal employees and contractors to enable efficient travel. These efforts involve:

- a. Continuously evaluating travel and relocation programs and policies;
- b. Examining new technologies and automated systems;
- c. Analyzing the impact of current and proposed regulations, laws, executive orders, and international agreements;
- d. Facilitating the Interagency Travel Management Committee (ITMC); and
- e. Educating and training of federal travel professionals.

1.1.2 The General Services Administration's (GSA's) Office of Government-wide Policy's Center for Travel and Transportation Policy Formulation sponsors an Interagency Travel Management Committee (ITMC) that provides a forum through which federal agencies can exchange information and ideas for resolving common interests relating to the effective utilization of the Federal Travel Regulation (FTR). Through the ITMC, GSA strengthens lines of communication and disseminates information to agency representatives. To ensure compliance with internal agency rules and regulations, federal employees are referred back to his/her ITMC representative for direct assistance.

1.2 Agency Requirements

1.2.1 The Federal Travel Regulation (FTR), published by the General Services Administration (GSA), Travel and Transportation Management Policy Division, is the source for Federal policy on travel. The FTR is available at <http://www.gsa.gov/fttr>.

1.2.2 NASA Office of the Chief Financial Officer promulgates the Federal Management Requirements (FMR) to: (a) interpret statutory and other policy requirements in a manner that balances the need to ensure that official travel is conducted in a responsible manner with the need to minimize administrative costs, and (b) communicate the resulting policies in a clear manner to employees.

1.2.3 The NASA Federal Travel Regulation Supplement (NFTRS), contained here as Appendix A, is intended only to address matters for which NASA has authority or responsibility to set specific policy or establish specific procedures that apply only to NASA and matters not covered by the FTR. The FTR, as amended, should first be consulted regarding travel policy. It is incumbent upon NASA employee-travelers, authorizing and approving officials and financial management personnel to be familiar with the provisions of the FTR, in relation to their specific roles in the travel process.

1.2.4 Chapters 300 and 301 of the FTR are published by GSA in a plain language, question and answer, format. To facilitate the review of NASA-specific provisions related to the FTR and simplify Agency travel regulations, the FMR NFTRS is structured, formatted, and numbered consistent with the FTR. Only questions for which there are NASA-specific answers are included.

Chapter 2. Requirements Relating to Conference Attendance and Reporting

2.1 Overview.

This chapter sets forth requirements for planning and reporting conference costs and adhering to foreign conference attendance limits.

2.2 Source of Requirements.

2.2.1 Foreign Conference Attendance Limit. All recent appropriations acts governing NASA, including the Consolidated Appropriations Act for Fiscal Year (FY) 2010, limit NASA attendance at any one foreign conference to 50 NASA employees.

2.2.2 FY 2009 Funding Cap. The 2008 NASA Authorization Act limited NASA's 2009 conference-related expenses to \$5 million. This funding limit was not extended and thus applies only to any program year (PY) for which PY 2009 funds still remain available for use.

2.2.3 Reports on NASA-Sponsored Conferences. The 2008 Authorization Act also required NASA to provide detailed quarterly reports to NASA's Office of Inspector General (OIG) on NASA-sponsored conferences costing more than \$20,000. While this requirement was not continued in subsequent legislation, NASA will continue to collect and review this information internally.

2.2.4 Reports on All Conference-Related Costs. Congress also directed NASA to report all costs of both sponsoring and attending conferences in FY 2008 and FY 2009. Despite NASA's improved conference reporting process, this report proved very labor-intensive and costly to implement. As Congress has not extended this requirement to subsequent years and as it is not in the best interests of the Agency to continue expending the considerable resources required to generate this report, it is no longer generated. However, the Agency continues monitoring these costs in less detail for internal use.

2.3 Roles and Responsibilities.

2.3.1 The Office of the Chief Financial Officer (OCFO) shall:

- a. Maintain policies and procedures for conference-related data collection and reporting.
- b. Coordinate the final review of the quarterly sponsored conference report.
- c. Designate an Agency travel policy coordinator to oversee these processes and, in the event of conflicting determinations by conference points of contacts (POCs), to issue final determinations under this NPR.

2.3.2 Each Center Chief Financial Officer (CFO) and Official-in-Charge (OIC) of an HQ Office shall designate a conference reporting point of contact (POC) and an alternate POC for that Center or Office.

2.3.3 Each Center/Office Conference Reporting POC shall:

- a. Help travelers, travel preparers, sponsoring organization POCs, and other Center/Office conference reporting POCs determine whether a given event meets this NPR's definition of "conference" and "NASA-sponsored" (see 2.4).
- b. Help the NASA Conference Tracking System (NCTS) moderator and Agency travel policy coordinator resolve conference determination questions.
- c. Provide guidance to sponsor organization POCs concerning the completion and submission of the NF 1784, NASA-sponsored event approval, NF 1785, NASA-sponsored conference reporting, and associated report forms.
- d. Oversee the review and correction of their organization's data and other conference report information.

e. Provide other assistance as requested by the NCTS moderator and travel policy coordinator regarding the Center's/Office's conference-related matters.

f. Assist with local Center or Office training and awareness efforts pertaining to this NPR.

2.3.4 NASA Conference Sponsor Organizations. Each NASA organization that plans to sponsor a conference shall appoint a sponsor organization POC before making substantive plans and notify the cognizant Center/Office Conference Reporting POC of the name of the Sponsor Organization POC for the event.

2.3.5 Each Sponsor Organization POC shall:

a. Coordinate with the cognizant Center/Office conference reporting POC(s), beginning with the first stages of planning, to ensure they are aware of the event and to obtain their help with policy and determination questions.

b. For any conference sponsored, ensure the timely, accurate preparation of the NF 1784, fully substantiate its cost estimates and any supporting documentation, obtain approving official signature, and submit the signed form in a timely manner to NASA Shared Service Center (NSSC).

c. Upon submitting the NF 1784 and receiving the NCTS Identifier for the conference, ensure that NASA attendees are instructed to use the NCTS Identifier on travel documents. The NSSC Moderator will enter the conference into NCTS and send the NCTS Identifier to the POC.

d. Ensure the timely and accurate preparation and submission of the NF 1785 and associated conference report documents.

e. Retain signed version of documents on behalf of the sponsoring organization in accordance with NPR 1440.6.

f. Provide other assistance as requested by the NCTS moderator and Agency travel policy coordinator with regard to the conference and its associated forms and reports.

2.3.6. Office of International and Interagency Relations (OIIR) shall:

a. Provide policy guidance regarding foreign travel and attendance related to foreign travel.

b. Review and coordinate certain conference-related foreign travel by NASA personnel.

c. Oversee the process to determine appropriate allocations in a timely manner for international conferences involving more than 50 NASA Federal employees who may seek to attend .

2.3.7 NSSC shall:

a. Assign an NCTS moderator to process requests for new conferences to be added to the NCTS database.

b. Maintain NCTS.

2.3.8 The NCTS moderator shall:

a. Maintain and monitor the Agency conference reporting mailbox.

b. Coordinate with the POCs and Agency travel policy coordinator to resolve any requests for conference determination and to update NCTS.

c. Assist the OCFO in maintaining reporting information received from conference sponsors and providing quarterly summaries to management.

d. Notify all Center/Office conference reporting POCs and alternates when conferences are added to NCTS.

2.3.9 NASA Enterprise Applications Competency Center (NEACC). The NEACC shall maintain and update regularly a list of NCTS codes available for selection in the electronic travel system travel authorization function code field, for use by travelers and travel preparers when preparing travel authorizations involving foreign and NASA-sponsored conferences.

2.3.10 Travelers, Travel Preparers, and Travel Approvers. All NASA travelers, travel preparers, and travel approvers are responsible for familiarizing themselves and complying with the requirements of this document.

2.4 Applicability and Definition of "Conference" and "Reportable."

2.4.1 Definition. For purposes of both conference reporting and foreign conference attendance limitation, the term "conference" means a meeting:

- a. Held for consultation, exchange of information, or discussion.
- b. Having speakers or discussion panels focusing on topical matters of interest and involving participation of a range of attendees from multiple agencies and/or nongovernmental entities.
- c. At least part of which is held at a non-NASA facility (see FAQs 4-1 through 4-3 for more information on what constitutes a NASA facility).
- d. Which is neither a NASA internal meeting (including operational meetings) nor formal training (see 2.4.2 and 2.4.3 below).

2.4.2 NASA Internal Meetings Are Excluded. The term "conference" does not include NASA internal meetings.

2.4.2.1 Definition of NASA Internal Meeting: Attendance and Subject Matter. A NASA internal meeting is a meeting attended only by:

- a. NASA civil service employees, detailees, special Government employees, or individuals attending on NASA-issued invitational travel orders (NASA Attendees).
- b. Employees of other Federal agencies, NASA contractors or subcontractors, or parties to intergovernmental or interagency agreements with NASA or the U.S. Government, when meeting on matters related to NASA's programs or operations.
- c. NASA grantees, their principal investigators, and co-investigators, when meeting on matters directly related to the work performed under a grant.
- d. NASA Space Act Agreement partners or prospective partners, when meeting on matters directly related to the activities covered under the Agreement.

2.4.2.2 Routine NASA Business, NASA Public Affairs Events are Not Conferences.

a. The term "conference" does not apply to:

(1) Routine NASA business; such as program/project reviews and meetings of international government officials to coordinate technical, operational, or programmatic matters; site visits and launches; or advisory committee meetings.

(2) Public affairs events the general public may attend gratis.

b. If the sole purpose of the meeting is to discuss NASA business such as scientific/technical or administrative/management issues or priorities, plans, or activities for a specific NASA program, project, or mission support matter, then the meeting is not a conference for purposes of this directive.

c. If a meeting is, otherwise, an internal NASA meeting, the presence of outside speakers or facilitators does not in itself make the meeting a "conference."

2.4.3 Formal Training Is Excluded. The term "conference" does not apply to meetings limited to formal training of NASA employees.

2.4.3.1 Definition of Training. For purposes of this NPR, training is defined as a planned, prepared, and coordinated program, course, curriculum, subject, system, or routine of instruction or education in scientific, professional, technical, mechanical, trade, clerical, fiscal, administrative, or other fields intended to improve individual and organizational performance and assist in achieving the Agency's mission and performance goals.

2.4.3.2 Training versus Conference.

a. An established course of instruction in a substantive field in a classroom setting is not a conference, and holding such a course at a rented facility does not transform it into a conference.

b. However, if a conference has a training aspect (e.g., helps employees maintain certifications or earn continuing education credits) but more closely meets the definition of "conference" than that of "training," it shall be treated as a conference. Many conferences present substantive educational information that does not meet the definition of formal training.

2.5 Foreign Conferences.

2.5.1 General. The requirements of this NPR do not replace, but are in addition to, other Agency or Center foreign travel approval requirements.

2.5.2 Attendance Limit. In recent years, NASA's annual Appropriations Acts, most recently the 2010 Consolidated Appropriations Act, have stated that no more than 50 NASA employees may attend a conference held outside the U.S. This limitation includes employees whose travel is fully reimbursable.

2.5.3. Definition of Foreign Conference.

2.5.3.1 United States. "United States," as defined in the Federal Travel Regulations (FTR), means the 48 contiguous states, the District of Columbia, and the states and areas defined under the term "Non-Foreign Area." Non-Foreign Area includes Alaska and Hawaii, the Commonwealths of Puerto Rico, Guam, and the Northern Mariana Islands, and the territories and possessions of the U.S. (excluding the Trust Territories of the Pacific Islands). (See FTR § 300-3.1)

2.5.3.2 NASA Facilities Outside the U.S. For purposes of this attendance limit, an event that would normally not be considered a "conference" because it is held entirely at a NASA facility shall be considered a "foreign conference" if the facility is outside the U.S., provided all other elements of the "conference" definition are met .

2.5.4 Non-Program Travel. Foreign conferences are "non-program" foreign travel. (See Appendix A.) If a trip combines travel to a foreign conference with other purposes, the procedures for "non-program" travel shall be followed.

2.5.5 Foreign Conference POCs.

2.5.5.1 Purpose. To better coordinate NASA's foreign conference-related travel, each Center and HQ Office shall designate a single POC to coordinate and monitor such travel.

2.5.5.2 All foreign travel and foreign conference POCs shall be identified to OIIR.

2.5.6 NCTS and Foreign Conferences. NCTS (See Paragraph 2.7) is an automated Web-based system that assigns each NASA-sponsored or foreign conference a unique identifier to facilitate cost and attendance tracking. NCTS also enables foreign conference travel approvers to register the name of a prospective attendee and receive automated verification that the attendance limit has not been reached prior to approving that attendee's travel. NCTS automatically accepts requests up to an Agency moderator-established first threshold, permitting automatic NCTS approval of names for conferences that only a small number of NASA employees are expected to attend. For conferences for which a larger NASA attendance appears likely, once the initial threshold has been reached, the moderator manually accepts registration for the remaining spaces as approved by OIIR, working with other offices and Centers to determine Agency-wide allotments, never exceeding 50 total.

2.5.7 Process.

2.5.7.1 NCTS Identifier. All persons preparing travel documents for foreign conference attendance shall include the NCTS Identifier on all associated travel documents.

2.5.7.2 Travel Approvers. All approvers remain responsible for approving only those foreign conference travel authorizations that fall within the threshold of 50 attendees (NASA-wide) to any one foreign conference and shall not approve such travel before receiving NCTS approval.

2.5.7.3 OICs and Foreign Travel Coordinators shall ensure that:

- a. Foreign travel authorizations are submitted at least four weeks before the planned departure date.
- b. Foreign travel reports are submitted weekly to OIIR.
- c. The NCTS is used consistently.

2.5.7.4 Center or Office Foreign Travel Procedures. Once approved in NCTS, travel authorizations associated with foreign conferences shall be processed for approval in accordance with other established Center or HQ procedures for foreign travel.

2.5.7.5 Supervisor Approval Required.

Note: NCTS approval pertains only to the 50-person limit; it in no way removes the need for travelers to

secure their supervisor's approval to attend a given conference nor supersedes a supervisor's disapproval of a request to attend a given conference.

2.6 NASA-Sponsored Conferences.

2.6.1 Definition of "NASA-Sponsored Conference." A NASA-sponsored conference is a "conference" as defined in 2.4 above, of which NASA is a "primary sponsor" as defined in 2.6.2 and 2.6.3 below.

2.6.2 Definition of "Sponsor" (Also see "Primary Sponsor," 2.6.3).

2.6.2.1 Costs Constituting Sponsorship. NASA is considered a "sponsor" if it funds costs:

a. For hosting (e.g., facility rental) or underwriting (e.g., financial support to another sponsor of the conference, brand awareness, etc.).

b. That are more than de minimis, i.e., that are a significant, not just a minor, share of total conference expenses.

2.6.2.2 Costs Not Constituting Sponsorship. NASA is not considered a sponsor based solely on participation costs, such as for:

a. Civil service employees' travel.

b. Exhibitions and presentations.

2.6.3 Definition of "Primary Sponsor." NASA is considered a primary sponsor only if it is the principal sponsor of the event or one of the principal cosponsors if there are multiple sponsors.

2.6.3.1 In comparing co-sponsors' costs to determine whether NASA is a primary sponsor versus a minor sponsor, only sponsorship costs, not travel costs, shall be considered.

2.6.3.2 If NASA pays (to the best of its information) approximately the same as or more than the other largest payers of hosting costs, it is considered one of the primary sponsors.

2.6.3.3 If the largest contributor pays substantially more in hosting costs than NASA (e.g., over twice what NASA pays), NASA is not considered a primary sponsor.

2.6.3.4 For assistance determining whether NASA is a primary sponsor of a given conference, sponsors and attendees shall consult their Center POC. A list of Center POCs can be found at <http://conference.nasa.gov>.

2.6.4 Conferences Sponsored by NASA Grantees and Cooperative Agreement Partners.

If a NASA grantee or cooperative agreement partner sponsors a conference, NASA is not typically considered the sponsor, even if part of the award is used to pay conference hosting costs, since these awards are program-specific. However, if the agreement or grant specifically requires the recipient to host (and not just disseminate results at) a conference on behalf of NASA, the conference is considered sponsored by NASA and is reportable if it meets the requirements of Section 2.7.2.2 below (i.e., it is a "conference" per Section 2.4, NASA is a primary sponsor, and the total cost to NASA is over \$20,000).

2.6.5 Multiple NASA Organizations Co-Sponsoring One Conference. If multiple NASA Offices or Centers fund a conference, the Office or Center responsible for the event's overall planning and sponsorship shall be responsible for determining whether it is a conference, approving the site selection, contracting for facilities and services, and preparing and submitting the associated NF 1784 and post-conference report, including the NF 1785.

2.6.6 Cost-Effective NASA-Sponsored Events.

2.6.6.1 Use of NASA or Federal Sites.

a. For both conference and non-conference events primarily sponsored by NASA, NASA sponsor organizations shall take reasonable efforts to determine if there is a NASA or other Federal facility available for the event on a more cost-effective basis that satisfies the event objectives.

b. If a NASA conference sponsor organization selects a non-Federal facility as the conference site, the NASA sponsor shall clearly explain on the NF 1784 (see Section 2.7 below) the reason for this choice.

2.6.6.2 Additional Considerations Regarding Cost and Appropriateness.

- a. NASA sponsors shall comply with Government-wide regulations on conference planning. (See 41 CFR 301-74 (http://www.access.gpo.gov/nara/cfr/waisidx_09/41cfr301-74_09.html)).
- b. Being mindful of cost considerations, planners shall give precedence to sites within the proximity of a NASA Center meeting "local" travel requirements for local attendees, whenever such sites would meet the event objectives, to reduce the number of attendees requiring TDY travel and lodging accommodations.
- c. In addition to cost considerations, NASA organizations planning to sponsor an event shall be conscious of appearances in selecting the event site.
- (1) Planners shall avoid selecting destinations likely to create an appearance that the event is wasting Government resources in order to facilitate personal vacations or entertainment for employees.
- (2) Planners shall take care to select event locations that are cost-justified and appropriate to the purpose of the event and that minimize, to the greatest extent possible, any appearance of impropriety.
- d. NASA event sponsor organizations shall also be cognizant of the appearance concerns inherent in some forms of collateral entertainment, such as golf tournaments, hospitality suites, and onsite gambling facilities and, to prevent the public perception that Federal funds are being used inappropriately, schedule such events only during off-duty hours and clarify that they are voluntary and that participants are responsible for their own associated costs.

2.6.7 Funding and Collection of Fees.

2.6.7.1 As a general rule, Federal agencies lack authority to collect registration fees for conferences or other events they sponsor.

- a. Agencies shall not supplement their appropriated funding for an event by collecting conference fees, exhibitor fees, attendance fees, or sponsorship fees from other persons or entities.
- b. NASA shall not use contractors to accomplish what the Agency is prohibited from doing accordingly.
- (1) Conference planners shall not collect fees to offset the Agency's costs of hosting a conference.
- (2) Before retaining a professional conference planner, the Agency shall ascertain that enough appropriated funds are available to pay the contractor's costs.
- (3) Even if a Space Act Agreement allows the partner to collect registration fees, doing so may raise other fiscal concerns, such as augmentation of Agency appropriations; in such situations, planners shall consult with their appropriate local counsel before proceeding.
- (4) NASA shall not solicit NASA contractors or other non-NASA entities to contribute to NASA events without prior consultation with their local CFO's and counsel's offices.
- c. NASA employees shall not enter into arrangements with outside entities or persons for sponsorship of meals, refreshments, or entertainment for or at NASA events without prior consultation with their local CFO's and counsel's offices.
- (1) Outside sponsorship does not become allowable simply because there are no or insufficient appropriated funds for an event.
- (2) Corporate sponsorship may raise appearance or gift issues. NASA event planners shall refrain from making arrangements involving corporate sponsorship until local counsel has fully reviewed and approved the sponsorship and associated arrangements.
- (3) NASA shall not solicit NASA contractors or other non-NASA entities to contribute to these aspects of NASA events.
- d. Certain circumstances may afford cost-sharing opportunities. For instance, in some cases, NASA and a contractor may sign a no-cost contract under which each party bears certain costs and the contractor collects fees to offset its own costs. However, no NASA sponsor organization shall enter into any such agreements or structure an event to permit acceptance of fees or services before seeking advice from their local CFO's and counsel's office.

2.6.8 Using Appropriated Funds for Food, Refreshments, and/or Entertainment at Conferences. 2.6.8.1 General Prohibition, Limitations, and Requirements. GAO case law generally prohibits agencies from using appropriated funds to pay for food at agency-sponsored events because food is a personal expense. a. NASA may use appropriated funds

for meals or entertainment only in certain limited exceptions in 2.6.8.2 through 2.6.8.6 below.

b. Even when such use is not prohibited, employees shall try to avoid structuring events to provide food unless necessary to achieve the Agency's goals.

c. If an organization believes that use of appropriated funds for food or entertainment at a NASA-sponsored conference is permissible under one or more of the exceptions in 2.6.8.2 through 2.6.8.6 below:

(1) The Approving Official (see 2.7.1.4) shall explain the rationale for providing food under the applicable exception(s) in Section VI of NF-1784 (see 2.7.1), seeking guidance from their local CFO's and counsel's office as needed.

(2) The sponsoring office shall provide clear written reminder(s) (e.g., via event Web sites, applications, announcements, e-mails, etc.) to all attending employees to exclude from their travel vouchers reimbursement requests for any meals already provided at Government expense.

d. Under the circumstances described in 2.6.9.1, NASA shall not provide food to non-Federal persons, unless they pay for their own food in an appropriate manner that does not augment the Agency's appropriations, e.g., under a no-cost contract between NASA and the contractor, where fees for food/refreshments go to the contractor. 2.6.8.2 Exception: Formal Conferences.

a. The Government Employees Training Act (5 U.S.C. § 4110) allows agencies to spend appropriated funds "for expenses of attendance at meetings which are concerned with the functions or activities for which the appropriation is made."

b. Pursuant to this authority, these expenses may include meals and refreshments at a formal, NASA-hosted conference when:

(1) The meals and refreshments are incidental to (i.e., are associated with, or occur as a consequence of) the conference.

(2) Attendance at the meals and during the refreshments is important for NASA to ensure the full participation of attendees in essential discussions, lectures, or speeches concerning the purpose of the conference.

(3) Substantial conference functions also occur at other times than when food is served.

c. The definition of a "formal" conference, for purposes of establishing that food may be provided, is one that includes: topical matters of interest, the participation of multiple agencies and/or nongovernmental participants, a published substantive agenda, registration, and scheduled speakers or discussion panels.

(1) Meetings that discuss business matters internal to NASA or other topics with little relevance outside NASA do not constitute formal conferences. In most cases, NASA shall not use appropriated funds to provide meals and refreshments at such events.

(2) Conference sponsors who intend to use a Government purchase card to pay for any or all of such food and refreshments shall comply with Procurement Information Circulation 10-14 and other applicable procurement guidance.

2.6.8.3 Exception: NASA-Sponsored Conference Venues where Food Costs are

Non-Negotiable.

a. If a venue provides food and/or refreshments as part of its facility rental package and, following request by NASA, the venue will not negotiate the cost for the food out of the package, the Agency may pay the full fee and allow the food/refreshments to be provided.

b. However, if a venue offers to negotiate an option to either exclude or include food/refreshments as part of a package deal, the exception allowed in 2.6.8.3.a for non-negotiable food costs shall not apply.

(1) In cases such as 2.6.8.3.b above where the venue will negotiate out the food/refreshments and their associated charges, the NASA organization may only accept a package that excludes the food/refreshments and saves the associated costs.

(2) The standard for non-negotiability is met only if the venue negotiates an entire package that includes food and declines to negotiate a lesser rate that excludes the food. If the Agency refuses the meals and refreshments, it is still charged the full package amount: i.e., where the charge is the same regardless of whether the venue provides the food and/or refreshments or not.

(3) If food is paid for with appropriated funds because the non-negotiability standard is met as described above, the employees' per diem shall be reduced to reflect any meals provided. No per diem reduction is necessary to account for provision of a simple water and coffee service, as that is considered de minimis (i.e., insignificant in the pertinent context).

2.6.8.4 Exception: Food at Awards Ceremonies. Rules governing use of appropriated funds for food, refreshments, and other purposes differ in the case of awards ceremonies (including ceremonies held in conjunction with a conference) as opposed to conferences as follows.

a. The Government Employees Incentive Awards Act allows use of appropriated funds for awards to Federal employees.

(1) The Act likewise allows use of appropriated funds for necessary expenses connected with honorary recognition of those employees, including food and refreshments for attendees at an awards ceremony.

(2) The Act provides no authority to use appropriated funds to honor non-employees.

b. Appropriated funds may only be used to provide food and/or refreshments for such awards ceremonies if:

(1) The event includes presentation of the awards in front of an audience other than awardees.

(2) The Agency has determined that the food/refreshments will materially enhance the ceremony.

(3) The food/refreshments are appropriate for the given circumstances and are served as part of the ceremony.

c. While light refreshments such as snacks, cake, hors d'oeuvres, sodas, and punch are typically appropriate for most awards ceremonies, meals are rarely appropriate. Approving Officials considering using appropriated funds for meals at employee award ceremonies held in conjunction with a NASA-sponsored conference shall obtain concurrence from their local Deputy Chief Financial Officer (DCFO) before proceeding.

2.6.8.5 Exception: Food at Receptions and Representation Events. Each year, NASA receives a small amount of appropriated funding, known as the Official Representational Fund (ORF) or the "Administrator's Fund," to use for official receptions and other representation purposes. If a NASA organization wants to use appropriated funds to purchase food and refreshments for an event that has a reception or representation purpose, but none of the exceptions described above (training, conference, awards ceremony) apply, it may be permissible to use ORF funds for this purpose. For information on when the funds may be used and the process for applying to the Administrator's office for such use, see NPD and NPR 9050.1, Official Representational Fund.

2.6.8.6 Exception: Food for Training Events. Per the Government Employees Training Act (5 U.S.C. § 4109), agencies may spend appropriated funds to reimburse employees (though not non-employees) for necessary expenses, including food and refreshments, incident to an authorized training program.

2.6.8.7 NASA-Sponsored Events at which Attendees Pay for their Own Food Expenses. NASA may also arrange for food to be provided at a NASA-sponsored event, as long as NASA structures the event in such a way that:

a. Attendees pay for their own food.

b. The Agency's appropriations are not thereby augmented.

(1) That is, NASA shall not set up a contract with a venue that includes providing food and then collect fees to offset NASA's costs.

(2) However, if the venue permits it, the NASA sponsor organization may arrange (outside NASA's contract) for an individual employee to collect attendee payments for food and pay them directly to the venue. For example, a venue may be willing to provide box lunches outside of the event contract and be paid directly by the attendees on the day of the event.

(3) Another option is for the venue to set up a pay-for-food kiosk where attendees can buy food onsite.

2.6.9. Using Appropriated Funds to Pay Travel Expenses for Non-Federal Participants .

2.6.9.1 General Prohibition. NASA is prohibited by law from using appropriated funds to pay for the travel, transportation, and/or subsistence of non-Federal attendees at meetings. "Meetings" in this context includes NASA-sponsored events , such as conferences.

2.6.9.2 Exception: "Employees" under FTR Section 301-1.2 (Invitational Travelers and Intermittent Employees).

NASA may pay for travel, transportation, and subsistence of persons who meet the definition of "employee" under FTR Section 301-2 (for example, invitational travelers and special Government employees) that perform a direct benefit for NASA.

a. In such cases an official NASA travel authorization shall be required.

b. For details, see Appendix A, Part 301-32.

2.6.10 Related Information on NASA Payments for Civil Service Employees Travel Expenses.

2.6.10.1 Payments to venue for food and lodging of civil service employees on travel. Whether for a conference or other type of travel, NASA may pay a venue directly for meals and/or lodging for civil service employees on travel, provided payments are consistent with statutory and regulatory limits on per diem and actual amounts and employee travel reimbursement claims are reduced to account for the meals and/or lodging provided. See the travel section of this NPR for further information.

2.6.10.2 Payment for "light refreshments" for civil service employees on travel to an official event. Similarly, whether for conference or other travel, NASA may pay for "light refreshments" for NASA employees on travel to an official event. See the travel section of this NPR for a definition of the persons covered by this provision, allowable types of refreshments, and related guidance.

2.6.11 Mementos, Awards, and Speakers' Gifts.

2.6.11.1 Necessary versus Optional Items.

a. Appropriated funds may be used to purchase items for attendees that are necessary for the proper functioning of a conference, such as nametags, notepads, and pens.

b. In general, appropriated funds shall not be used to purchase tokens, gifts, or souvenirs or to distribute such items to Federal employees, invited speakers, or other outside persons at a NASA event.

2.6.11.2 Recognition and Awards.

a. NASA may provide NASA employees appropriate recognition, including official awards for performance of their official duties, as determined by their supervisors in accordance with NPR 3451.1, NASA Awards and Recognition Program.

b. Official representation funds may be used for presentation items to non-NASA speakers if the requirements of NPD and NPR 9050.1, Official Representation Fund, are met.

2.6.11.3 Mementos and Informational Items.

a. NASA has relied on its statutory authority to disseminate information about its programs and activities and the results thereof as a basis to purchase and distribute items of nominal value, such as bookmarks and posters that provide information about NASA programs or missions and related scientific, technical, engineering, and mathematics (STEM) topics.

b. Planners shall ensure there is a link between the type of item selected and the authorized Agency function to disseminate information.

c. If the items are appropriate for purchase and suitable for the particular audience, these types of inexpensive, informational items may be distributed at a NASA event.

d. No such purchases shall be made unless approved in advance by the local Office of Communication, with guidance from the local CFO's and counsel's office as needed.

e. In addition, planners shall not purchase or distribute items that have intrinsic value to the recipient beyond the message they provide (e.g., clothing items, ice scrapers, key chains).

2.6.11.4 Advertising. NASA necessarily uses various methods to publicize an event. In so doing:

a. NASA employees shall avoid giving the appearance that the Agency is endorsing an outside entity, such as posting corporate logos on a NASA Web site.

b. The NASA Insignia (including "the Meatball"), initials, or name may be used only in accordance with Federal regulations and with the approval of the NASA Public Affairs Office.

c. No NASA employee shall permit an outside entity to use the NASA Insignia without first obtaining permission from NASA HQ to do so.

2.7 The NF 1784 and NF 1785: NASA-Sponsored Conference Approval and Reporting.

2.7.1 NF 1784, the NASA-Sponsored Event Approval Form.

2.7.1.1 Purpose. The NF 1784 estimates the probable cost and attendance of a future NASA-sponsored conference. It also ensures that, per the FTR and the NASA FTR Supplement (NFTRS), the sponsoring office has developed cost estimates for several alternative venues to support the approving official's site decision, has considered NASA or other Federal sites, and has analyzed and made reasonable efforts to control food and beverage costs.

2.7.1.2 Required Use. An NF 1784 is required for any conference of which NASA is a primary sponsor as defined in 2.6.3.

Note: If an event is not a "conference," no NF 1784 is required. Sponsors of non-conference events who choose to use an NF 1784 (e.g., for planning or procurement documentation) shall not submit it to NSSC.

2.7.1.3 Preparing the NF 1784.

a. Forms and Instructions. The NF 1784, detailed instructions, and further guidance are available at <http://conference.nasa.gov> .

b. A searchable database of NF 1784s and Post-Conference Reports (including NF 1785s) of previous conferences is available at <https://search.nssc.nasa.gov/search/general.html> . Documents for a particular conference can be found by using the first "Text" search field and inputting between asterisks the NCTS Identifier of the conference for which you wish to search, e.g. *13544-09.*

2.7.1.4 Signatures.

a. Sponsor Organization POC. The Sponsor Organization POC shall review the NF 1784 for completeness and accuracy, sign it, and be prepared to fully substantiate the cost estimates and any supporting documentation to the satisfaction of the approving official.

b. Approving Official: Conferences below \$100,000. A responsible senior executive in the Senior Executive Service (SES) or, if there is no SES, a senior-level or scientific or professional position (SL/ST) within the sponsoring organization shall approve and sign the NF 1784.

c. Approving Official: Conferences above \$100,000. For events with total estimated costs, including travel, of at least \$100,000, the approving official signing the NF 1784 shall be:

(1) For HQ organizations within a Mission Directorate (MD), the cognizant official no more than two-levels below the MD Associate Administrator (AA).

(2) For HQ organizations that report directly to the Administrator rather than to an MD AA, the cognizant official no more than one-level below the head of that organization.

(3) At Centers, the cognizant official no lower than the level of a Directorate head or equivalent (e.g., Chief Financial Officer, Chief Counsel, etc).

2.7.1.5 Submitting the NF 1784. The sponsoring organization POC shall e-mail a final signed NF 1784, along with required supporting information:

a. To the NSSC (NSSC@NASA.gov), and the sponsoring organization's Center or Office Conference Reporting POC in PDF form, with the e-mail subject line "NF 1784" followed by the NCTS Identifier number and the event's official name.

b. At least 30 days before the start of the event.

2.7.1.6 NF 1784 to be Submitted Before Funds Committed.

a. The sponsoring office POC shall ensure that the NF 1784 has been submitted to NSSC and approved before they

request any contracting officer to execute agreements or contracts with conference locations, caterers, or anyone else providing conference services to the Agency.

b. No non-refundable funds shall be committed for the event (e.g., site deposit, catering contracts, etc.) before a completed NF 1784 is submitted to NSSC.

c. An exception shall be allowed for conference support contractor costs associated with preparations leading up to and including event site selection and preparing the NF 1784.

2.7.2 Post-Conference Report Forms (Including the NF 1785).

2.7.2.1 Purpose. The Post-Conference Report records a conference's actual costs, attendance data, contract features, and other related information. It is used for internal management reviews and made available as appropriate for external reviews. The NF 1785 is a key summary document that forms part of this report and is signed by the sponsor organization POC and the approving official as described below. It is not the entire report, but rather summarizes estimates developed in other parts of the report.

2.7.2.2 Required Use.

a. A Post-Conference Report is required for any NASA-sponsored event for which all three of the following are true:

(1) It is a conference, as "conference" is defined in 2.4.

(2) NASA is a primary sponsor as "primary sponsor" is defined in 2.6.3.

(3) Its total actual cost to NASA (including both sponsorship costs and NASA travel costs) exceeds \$20,000 .

b. If the criteria in a.i or ii do not apply to the event, no post-conference report or NF 1785 shall be required for it, but an amended NF-1784 shall be submitted to the NCTS moderator, signed by the sponsor organization POC, clearly indicating that the event has subsequently been determined either not to be a conference or not primarily sponsored by NASA. Upon receipt the NCTS moderator will remove the event from the list of NASA-sponsored conferences.

2.7.2.3 Preparing the Post-Conference Report/NF 1785.

a. Forms and Instructions. Detailed instructions, samples, and templates (where practicable) for the Post-Conference Report, including the NF 1785 and other required displays, are available at <http://conference.nasa.gov> .

b. A searchable database of NF 1784s and Post-Conference Reports (including NF 1785s) of previous conferences is available at <https://search.nssc.nasa.gov/search/general.html> . Documents for a conference can be found by using the first "Text" search field and inputting between asterisks the NCTS Identifier of the conference for which you wish to search, e.g. *13544-09.*

2.7.2.4 Required Signatures.

a. Sponsor Organization POC. The sponsor organization POC shall review the Post-Conference Report for completeness and accuracy, sign the NF 1785, and be prepared to fully explain the report's contents to the satisfaction of the approving official.

b. Approving Official. The responsible official who signed the event's NF 1784 (or, if unavailable, another cognizant senior executive (SES or SL/ST) in the sponsoring organization) shall review the Post-Conference Report and sign the NF 1785 that forms a key part of it.

2.7.2.5 Conferences costing less than \$20,000. If the final cost to NASA of the conference is determined to be less than \$20,000 (i.e., criteria 2.7.2.2.a.iii is determined not to apply to the event), an NF-1785 must still be submitted, but should only include the conference title and identifier, the approximate total cost to NASA clearly showing such is less than \$20,000, and be signed only by the sponsor organization POC. NCTS moderator will then remove the event from the list of NASA-sponsored conferences.

2.7.2.6 Submitting the Post-Conference Report. The POC of the sponsoring organization shall submit a complete and final Post-Conference Report, including the signed NF 1785 to the NSSC (NSSC@NASA.gov) and the sponsoring organization's Center or Office conference reporting POC in PDF form, with the e-mail subject line "Post-Conference Report" followed by the event's NCTS Identifier (number and name). The final post-conference report, including the signed NF 1785, shall be submitted no later than 45 days after the end of the event. The event POC may submit a draft Post-Conference Report, or portions thereof, before this deadline to the NASA Travel Policy Coordinator (but not to the NSSC) to discuss progress on the report and obtain guidance.

2.7.3 Detailed roles and responsibilities for NASA-sponsored conferences and related forms and reports.

2.7.3.1 Sponsor Organization POC. The event sponsor organization POC is responsible for coordinating all aspects of the event's planning, execution, and reporting. This includes the following:

- a. Assisting the approving official as requested to prepare the NF 1784 and forwarding it to NSSC as required.
- b. For NASA-sponsored conferences requiring a Post-Conference report (see 2.6.9); generating an accurate final attendee list (FAL) recording who actually attended the event; obtaining and maintaining a copy of all invoices, receipts, purchase orders, task orders, and other financial documents associated with the conference; assisting the approving official as requested to prepare the Post-Conference Report; forwarding it to the NSSC as required; maintaining a copy of the report and supporting documentation; and making these materials available upon request to appropriate reviewers.

2.7.3.2 Approving Official. The approving official is responsible for:

- a. The quality and integrity of the data in the NF 1784 and the Post-Conference Report (if required). Therefore, the approving official is responsible for assigning appropriate staff to work with the sponsor organization POC to prepare these documents.
- b. Knowledgeably approving (by signing the NF 1784) the conference site that he or she finds to be in the best interest of the Government.
- c. Ensuring that copies of all documents listed in 2.6.10.1.b above are maintained and that preparers are available to explain them to reviewers (e.g., auditors) as requested.

2.7.3.3 Center/Office Conference Reporting POC. The sponsoring organization's cognizant Center/Office conference reporting POC is responsible for providing guidance to the sponsor organization POC on completing the post-conference report.

2.7.3.4 Agency Travel Policy Coordinator. The Agency travel policy coordinator is responsible for periodically reviewing for internal consistency the NF 1784s and Post-Conference Reports submitted, notifying the event sponsor organization POC and the Center/Office conference reporting POC of any obvious inconsistencies or other readily apparent need for revision in the Post-Conference Reports, and making the signed NF 1784s and Post-Conference Reports available for internal management review. The Agency travel policy coordinator is also responsible for updating requirements for these documents, making the updated information available at the Conference Resource Web site, and answering questions that are not fully addressed in the instructions or Web site and that the Center/Office POC is unable to answer.

2.7.3.5 NCTS Moderator. The NCTS moderator is responsible for maintaining searchable electronic records (e.g., PDFs) of all submitted NF 1784s and the NF 1785 portion of Post-Conference Reports and a PDF archive of the complete Post-Conference Reports and any related quarterly reports on NASA-sponsored conferences.

2.8 The NASA Conference Tracking System (NCTS).

2.8.1 Overview.

2.8.1.1 Purpose. NCTS is an Agency-wide database that facilitates cost reporting for NASA-sponsored conferences and tracking of Agency-wide attendance ceilings for foreign conferences to ensure that NASA does not exceed the Congressionally established ceiling of 50 NASA attendees at any one foreign conference.

2.8.1.2 Usage. NCTS assigns a unique Identifier (number/name) to each NASA-sponsored conference (as defined in 2.6) and each foreign conference that at least one NASA employee plans to attend. All NASA employees and NASA conference support contractors can access NCTS's searchable list of these conferences and their Identifiers at <http://ncts.nasa.gov>. Directions for its use are provided in detail at the NASA Conference Resource Web site, <http://conference.nasa.gov>. All travel authorizations and all travel vouchers (i.e., expense reports) for NASA-sponsored and foreign conferences shall include the NCTS Identifier.

2.8.2 NASA-Sponsored Conferences.

2.8.2.1 Sponsoring Organization POC. The POC of any NASA organization sponsoring a conference shall prepare and submit an NF 1784, as described in 2.6.8 above. This includes conferences that are currently estimated to cost less than \$20,000, but for which the sponsor cannot clearly determine final costs to NASA are under \$20,000 (e.g., where

attendee count/travel costs might increase sufficiently to make the total costs exceed \$20,000).

2.8.2.2 NCTS Moderator. Upon receiving an NF 1784, the NCTS moderator shall:

- a. Input the conference to NCTS.
- b. Notify the sponsoring organization POC of the conference's NCTS Identifier.
- c. Notify all Center/Office POCs and alternates that the event has been added to NCTS.

2.8.2.3 Attendees. If a prospective attendee thinks that an event may be a NASA-sponsored conference as defined in Section 2.6 of this NPR, the prospective attendee (or their travel preparer) shall search NCTS for it.

- a. If the conference is in NCTS, the prospective attendee (or their travel preparer) shall include its NCTS Identifier on the travel authorization and voucher.
- b. If the event is not in NCTS, the prospective attendee (or their travel preparer) shall notify the Center/Office conference reporting POC (listing can be found at <http://conference.nasa.gov>).

2.8.2.4 Center/Office conference reporting POCs. Upon receiving notification that an event that may be a NASA-sponsored conference has not been entered into NCTS, Center or Office conference reporting POCs shall determine whether the event is a conference and if it is, identify which NASA Center is most closely associated with the event (i.e., most likely sponsor) as follows:

- a. If the sponsoring Center or HQ Office is the conference reporting POC's own Center or office, the conference reporting POC shall ensure the sponsor organization prepares and submits a NF 1784 as required.
- b. If the sponsoring organization POC fails to do so promptly, the Center/Office conference reporting POC shall prepare and submit to both NSSC and the NASA travel policy coordinator an initial (place-holder) NF 1784 that includes the event's name, dates, and location, so it can be assigned an NCTS Identifier by NCTS.
- c. The Center/Office conference reporting POC shall forward a copy of the placeholder NF 1784 and the NCTS Identifier Code to the sponsoring organization and request the sponsor organization to complete the final NF 1784 promptly.
- d. If the Center/Office conference reporting POC believes that the conference is being sponsored by an organization within a Center or HQ Office other than his or her own, the Center/Office conference reporting POC shall notify the sponsoring organization's Center/Office conference reporting POC.
- e. Upon receiving such notification, the sponsoring Center's/Office's conference reporting POC shall then take the steps outlined in 2.7.2.4.a-c above.

2.8.2.5 Changes for NF-1784. Any changes to an NF-1784 should be submitted using an NF-1784, but clearly identifying the form as an amended filing, listing the assigned NCTS Identifier in the title field.

2.8.3 Foreign Conferences.

2.8.3.1 Inputting a Conference to NCTS.

- a. NASA employees planning to attend a foreign conference or their travel preparers shall search NCTS for the conference and use its NCTS Identifier on the travel authorizations (and after the event, on the vouchers).
- b. If the event is not in NCTS, then the prospective attendee or their travel preparer shall input it. For event input instructions, see the NASA Conference Resource Web site, <http://conference.nasa.gov>.
- c. The moderator reviews the input for completeness, assigns a unique conference Identifier, lists the new conference record in NCTS, and e-mails a confirmation to the requestor, typically within one working day.

2.8.3.2 Inputting a Traveler's Name to NCTS.

- a. Some Centers allow only travel preparers, travel approvers, and/or the Center foreign travel coordinator to input a prospective foreign conference attendee's name to NCTS, whereas other Centers allow prospective attendees to input their own names. Prospective attendees shall follow their local Center process. General procedures are described at the Conference Resource Web site, <http://conference.nasa.gov>; Center-specific procedures are available from Center foreign travel coordinators and Center conference reporting POCs.
- b. The moderator shall provide notification regarding whether the prospective traveler is within the 50-person ceiling.

c. No approvers shall approve travel to a foreign conference without first receiving notification from the moderator confirming that the traveler is within this limit.

2.8.4 Conference Determinations. Prospective attendees of foreign and NASA-sponsored events and NASA organizations sponsoring events can usually determine, without assistance, whether an event is a conference per the criteria in this directive and should be input to NCTS, or if it is not a conference. However, in instances where it is unclear whether an event is a conference if it and the event is either NASA-sponsored or foreign, users shall fill out and send to their Center conference reporting POC a Conference Determination Request Form (CDRF). The list of POCs and the CDRF are available at <http://conference.nasa.gov>. The CDRF shall only be used for foreign and/or NASA-sponsored events, not for non-NASA sponsored domestic events.

2.9 Preparing Travel Authorizations and Vouchers.

2.9.1 Special Procedures for Conferences.

2.9.1.1 "Conference" as Trip Purpose.

a. Persons preparing travel authorizations involving any conference attendance shall select "conference" in the electronic travel system Trip Purpose field.

b. Users shall select "conference" only for trips that include events meeting the definition of "conference" in 2. 4.

c. Users shall select "conference" for all conferences, even those that are domestic and non-NASA-sponsored. This enables compliance with the FTR and with other summary-level General Services Administration (GSA) travel reporting requirements.

d. Users shall select "conference" for any trip that involves a conference. This includes trips that include conferences, but have multiple purposes, even if some of the purposes are not conference-related.

2.9.1.2 NCTS Identifier. For foreign or NASA-sponsored conferences only, users shall select the conference's NCTS Identifier when preparing travel authorizations by using the drop-down menu in the electronic travel system's function code field. If the Identifier was not entered in the traveler's initial authorization, it is the traveler's responsibility to ensure that before creating the voucher an amended authorization is entered replacing the incorrect function code with the correct NCTS Identifier. This code facilitates accurate, immediate tracking of foreign conference attendee numbers via Business Warehouse (BW), as well as cost and attendance reports for NASA-sponsored conferences.

2.9.1.3 Non-Travel Costs. To ensure that non-travel costs are included in NASA-sponsored conferences cost reports, persons incurring non-travel costs connected with a NASA-sponsored conference shall provide the sponsoring organization's POC cost information and supporting documents as requested.

2.10 Reportable Expenses for NASA-Sponsored Conferences.

2.10.1 General Guidance.

2.10.1.1 Reportable Expenses. The following expenses for NASA-sponsored conferences are reportable:

a. Travel costs (e.g., transportation, lodging, per diem, and other travel expenses).

b. Non-travel costs (e.g., cost of developing conference materials and other costs associated with supporting a conference, such as handouts, exhibits, and facility rental).

c. Costs for employees to attend conferences as judges, speakers, presenters, or panelists.

d. Costs for detailees and persons traveling on invitational travel orders or otherwise sent to a NASA-sponsored conference by the Agency.

e. All costs (including labor and burden) of NASA conference support contractors directly supporting NASA-sponsored conferences.

2.10.1.2 Non-Reportable Expenses. The following expenses for NASA-sponsored conferences are not reportable:

a. Civil Service Employees Salaries. These are not reportable because they are not related to conferences.

b. Conference costs paid for under a grant or cooperative agreement unless the terms of the grant or cooperative agreement require the recipient to host (and not just disseminate results at) a conference on behalf of NASA using the awarded funds and where NASA meets the definition of a primary sponsor in 2.6.3.

c. Attendance costs of NASA contractors, unless they are attending as conference support contractors (2.10.1.1.e).

2.10.3 Other Information on Reportable Costs. The frequently asked questions (FAQ) section at the end of this document provides further information on conference reporting requirements. In addition, the NASA Conference Resource Web site, <http://conference.nasa.gov>, provides more information on reporting, including instructions and sample reports, and a list of the Center/Office conference reporting POCs.

2.11 Program Year (PY) 2009 Appropriations Spending Cap.

2.11.1 No New Commitments Using Unexpired PY 2009 Funds. The 2008 Authorization Act placed a \$5 million cap on the use of NASA FY 2009 appropriations for conference expenditures. As this limitation remains in force regarding these funds, no PY 2009 funds shall be used to incur new commitments or obligations in connection with a conference. For purposes of this paragraph, the term "conference" also applies to NASA-sponsored events that meet the definition of "conference" under NASA Interim Directive (NID) 9312.2 (including events not otherwise conferences but for meeting the "food exception" under NID 9312.2). 2.11.2 Adjustments. The sole exception to this prohibition is that commitments and obligations in the form of upward adjustments directly related to authorized conference travel approved in the electronic travel system before September 30, 2009, may be made after September 30, 2009, along with all appropriate costing and disbursements on obligations approved before September 30, 2009 (and related upward adjustments thereon).

2.11.3 Exceptions. There shall be no exceptions to this prohibition unless granted in writing by the Director of the Policy Division, OCFO, in response to a written request from the organization seeking the exception.

2.12 Records Management.

2.12.1 Sponsoring Organization. The sponsoring organization shall maintain copies of the NF 1784, the Post-Conference Report, and any other materials that might be necessary to substantiate them and make them available for inspection as requested by appropriate oversight organizations.

2.12.2 NSSC. The NSSC shall maintain searchable electronic records (e.g., PDFs) of all submitted NF 1784s and NF 1785s and a PDF archive of complete Post-Conference reports and quarterly summaries.

2.13 Conference Determination Chart.

2.13.1 The chart on the next page provides a step-by-step guide for determining:

a. Whether an event is a conference.

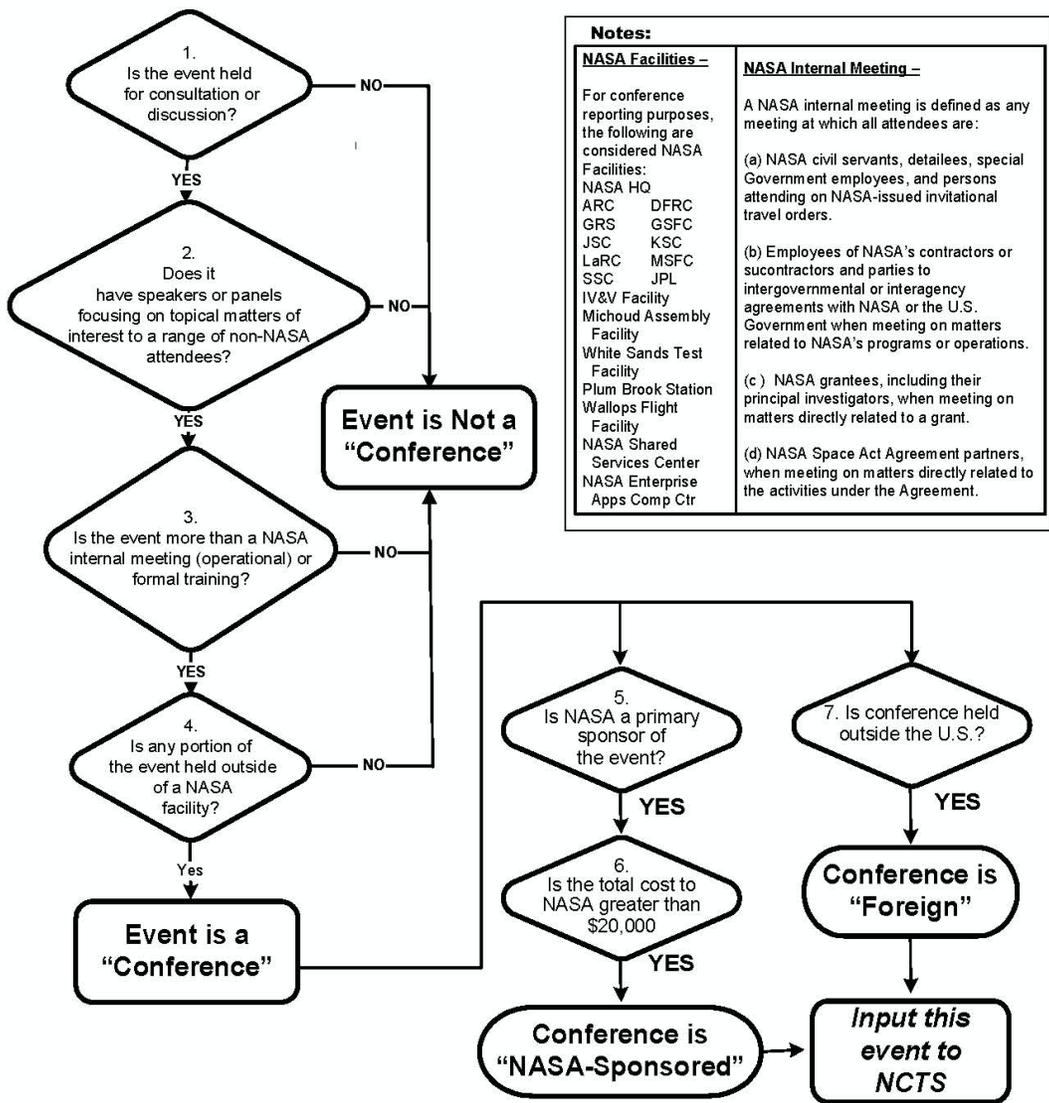
b. If it is a conference, then whether it is NASA-sponsored or foreign (and thus needs to be input to NCTS).

2.13.2 If an event is determined to be a conference, it is necessary to select "conference" as trip purpose when preparing travel documents in the electronic travel system. This is true not only for foreign and NASA-sponsored conferences, but also for those that are domestic and/or non-NASA-sponsored. Although NASA no longer reports the costs by conference of each conference attended (except for foreign and NASA-sponsored conferences), the Agency still monitors its overall conference attendance spending and selecting the correct purpose in the conference purpose field facilitates this effort.

2.13.3 To determine whether an event that is neither NASA-sponsored nor foreign is a conference, simply use your best judgment and the guidance in this document. Do not submit a CDRF.

2.13.4 For events that are NASA-sponsored or foreign, if after reading the NID, using the decision chart, and reviewing the FAQs you are still unsure whether an event is a conference, consult your Center or HQ Office conference POC. The POC may ask you to submit a CDRF to facilitate the decision. A list of POCs and the CDRF form are available at the Conference Resource Web site, <http://conference.nasa.gov>.

**Is the Event a Conference?
 Is the Conference NASA-Sponsored and/or Foreign?**



2.14 Frequently Asked Questions (FAQ)

The following FAQs provide more detailed guidance for determining whether an event is a conference and whether a conference is NASA-sponsored or foreign and must, therefore, be entered into NCTS. The first FAQs are grouped to correspond with this NPR's four criteria for what is a conference (See 2.4.a-d above) and are numbered according to the steps in the Conference Determination Chart (Figure 1).

1. Conference Criterion (a): Is the event being held for consultation, exchange of information, or discussion?

FAQ 1-1 (Name includes "conference"). For reporting purposes, should events whose name includes the word "conference" always be assumed to be conferences?

Answer : No titles can be misleading. The event's purpose, attendees, and subject matter are much more useful in determining whether it is a conference than whether its organizers call it a conference, meeting, exchange, discussion, etc.

2. Conference Criterion (b): Does the event have speakers or discussion panels focusing on topical matters that are of interest to and involve the participation of a range of participants from multiple agencies and/or nongovernmental entities?

FAQ 2-1 (Working groups). Are events entitled "working groups" considered conferences?

Answer : Usually not, but again, do not rely on the title. "Working group" meetings held in conjunction with association conferences, even if closed to all but subcommittee members, are typically considered part of the conference. However, working groups of members from multiple agencies addressing a specific, common operational issue (e.g., financial or personnel system configuration) and not a broader range of topical matters are not considered conferences.

FAQ 2-2 (Speakers, presenters, or judges). If a NASA employee serves as a speaker (including via the speakers' bureau), presenter, or judge at a non-NASA event, does that constitute conference attendance?

Answer : Generally, yes. The purpose of such appearances is usually outreach and awareness. However, presentations at local schools (primary or secondary) or events, such as festivals or state fairs are not considered conferences.

FAQ 2-3 (Grants and cooperative agreements). Should the conference-related costs of NASA grantees be reported?

Answer : No, unless the grant specifically requires the recipient to host (and not just disseminate results at) a conference on behalf of NASA with the awarded funds and the conference otherwise meets the criteria of a NASA-sponsored conference .

3. Conference Criterion (c): Is the event an internal NASA meeting or formal training?

Note: Neither internal NASA meetings nor formal training events constitute conferences.

FAQ 3-1 (Management/Governance meetings). Are internal meetings (operational, programmatic, and institutional management meetings) such as those required by NPD 7120 considered conferences?

Answer : No. Internal meetings are not considered conferences if held specifically for the purpose of governance of NASA or one of its organizational units or for carrying out a NASA program or project (i.e., an operational or "program-specific" purpose). Examples of such non-conference internal meetings include the NASA Advisory Council (NAC) and the Program Management Council (PMC).

FAQ 3-2 (Program meetings). Defining a conference as an "event held for consultation, exchange of information, or discussion" makes it sound as though many gatherings of NASA civil service employees with non-NASA persons are conferences. Is that correct?

Answer : No. If the sole purpose of an event is to discuss NASA business, such as plans or priorities for a specific NASA program, project, or mission support matter, then the event is not a conference. The definition of conference excludes routine NASA business, such as program/project reviews, site visits, launches, and advisory committee meetings, and also excludes public affairs events such as exhibits to which the general public is invited gratis.

FAQ 3-3 (Program-specific versus general nature). Is an event whose purpose is "discussion" of a specific program considered a conference?

Answer : It may or may not be, depending on both who attends and the nature of the subject matter. A "widely attended forum" held to disseminate research results is probably a conference. By contrast, if an event's attendees are all participating in a specific, NASA-funded project and the event's purpose is to discuss the project's progress and results, coordinate its activities, and/or identify next steps, it is probably an internal/programmatic meeting. Attendance by other agencies, contractors, and grantees who are involved in the program does not alter this conclusion.

If the program being discussed is not associated with a specific funded NASA mission, the analysis is more difficult. Especially when such meetings are open to the public and/or involve information exchange regarding multiple projects, it is necessary to evaluate each meeting case-by-case, carefully assessing all its characteristics to make a determination. If the event's main purpose is to promote general awareness of a program (project, grant, etc.), it is more likely a conference. If the main purpose is the specific planning, execution, or analysis of a program (project, grant, etc.), it is more likely an internal/programmatic meeting. For example:

(a) The Fundamental Aeronautics Annual Conference is a conference, since its purpose is to promote general awareness of the program and many of its attendees are members of the general public who are not specifically working on the program.

(b) Project Management (PM) Challenge was considered a conference in FY 2008 and FY 2011, since its focus was topical and of interest to a broad audience. However, in FY 2009, PM Challenge was structured as an internal NASA meeting and thus not considered a conference.

(c) The Fundamental Aeronautics Annual Review is not a conference because it is a formal program review. Its non-NASA participants attend primarily as review panel members, not to gain general awareness.

(d) Quarterly Program Management Reviews are not conferences, even if held offsite and attended by contractors or partners, as their purpose is program review, not general awareness.

(e) The following are examples of other events determined not to be "conferences:"

- i. Required programmatic and institutional management meetings, including those identified in NPD 7120.
- ii. Formal education or training classes.
- iii. Planning, programming, budgeting, and execution (PPBE) process budget reviews.
- iv. Routine program/project management meetings, including meetings with international program officials.
- v. Mishap Investigation Boards (usually at contractor facilities).
- vi. Program Management Reviews.
- vii. Management Council Meetings.

FAQ 3-4 (Division offsite meetings). Is my team's offsite meeting considered a conference?

Answer : Probably not. Such events usually qualify as NASA internal meetings due to the nature of both the attendees and the subject matter. The presence of an outside facilitator does not turn such a meeting into a conference. Even if outside participants other than facilitators attend such an event, it may still not qualify as a conference due to its subject matter. For example, the narrowly operational/programmatic focus of most lessons learned and strategic planning events typically keep them from qualifying as conferences. In a broader sense, topical meetings that lack a strictly operational focus (e.g., team-building events) may qualify as conferences.

FAQ 3-5 (JPL and other NASA contractors). If JPL or other NASA contractor employees attend an event, can it still qualify as a NASA internal meeting?

Answer : Yes. If all attendees are either NASA civil service employees or NASA contractors and the subject matter focuses on NASA programs or operations, the event is not a conference.

FAQ 3-6 (Facilitators). Does the presence of non-NASA facilitators, speakers, and presenters affect the determination of whether a meeting is a NASA internal meeting?

Answer : No, because of subject matter considerations. Outside facilitators and speakers are usually contractors whose participation relates to NASA programs or operations. Even when they are not paid contractors, their presence as speakers typically relates to NASA programs or operations.

FAQ 3-7 (Training). Are training events considered conferences?

Answer : Not usually, although in some cases they may be. An established course or set of courses in a classroom setting is not considered a conference, nor does holding such a course at a rented facility, (e.g., if attendance exceeds planned limits, necessitating rental of a local facility) make it a conference. Similarly, attendance at a university or professional school is not considered a conference. However, a widely attended event featuring a variety of topical meetings held at a hotel or other conference facility is a conference, even if some of its content can be seen as educational. Even if a participant's only reason for attending such an event is to update training on a specific area or maintain a certification, the more general nature of the meetings and their availability to a broad, general audience makes it a conference.

For example, events that would be considered conferences include the U.S. Office of Government Ethics' annual Government Ethics Conference, the Annual Federal Dispute Resolution Conference, American Institute of Aeronautics and Astronautics' (AIAA) Annual Conference on Small Satellites, the Institute of Electrical and Electronics Engineers (IEEE) Workshop on Network Security, the High Tech Small Business Conference, and the Flight Test Safety Workshop (providing an open forum on flight test safety issues). An example of an event not considered a conference is a semester-long university or professional school class. Remember to apply the other criteria for determining whether an event is a conference, such as who attended, the subject matter, and whether it was held offsite: events attended only by NASA employees and held entirely at a NASA facility are by definition not conferences.

FAQ 3-8 (College degrees). Is travel/temporary duty (TDY) in connection with NASA-paid education in pursuit of a college degree considered a conference?

Answer : No. This is not a discrete event such as is typically connoted by the term "conference" (i.e., from several hours to a week or two), but rather an ongoing, periodic activity.

4. Conference Criterion (d): Is any part of the event held outside of a NASA facility?

Note: An event is not considered a conference if all of its sessions, meetings, presentations, and other activities are held on a NASA facility.

FAQ 4-1 (Agency). Does "Agency" only mean NASA or does it include other Federal agencies?

Answer : When used in the singular, "Agency" only means NASA not any other agencies.

FAQ 4-2 (NASA facility). What is considered a NASA facility?

Answer : The following sites and/or buildings are considered NASA facilities: all Centers (ARC, DFRC, GRC, GSFC, JSC, KSC, LaRC, MSFC, SSC, and NASA HQ), and JPL, Independent Verification and Validation (IV&V) Facility, Michoud Assembly Facility, White Sands Test Facility, Plum Brook Station, Wallops Flight Facility, NSSC, and the NASA Enterprise Applications Competency Center (NEACC) .

A more complete list is at the conference Web site, <http://conference.nasa.gov> .

FAQ 4-3 (Leased facilities). Are facilities (office buildings, sites, etc.) leased by NASA on a continuing basis considered to be NASA facilities if they are not located within the boundaries of a NASA Center or other NASA facility identified in the answer to FAQ 4.2?

Answer : Yes. Section 203(c)(3) of the Space Act authorizes the NASA Administrator to acquire facilities by purchase, lease, condemnation, or otherwise. 5. Is NASA a primary sponsor?

FAQ 5-1 (Proportion and nature of NASA support). If NASA pays for an exhibit booth or otherwise provides a minor level of funding in support of a conference, is the conference considered "held by" NASA (i.e., is NASA a "sponsor" or "primary sponsor")? What if the event is paid for partly by NASA grant funds, or uses a NASA logo?

Answer : None of the above is by itself sufficient to constitute "sponsorship." It is necessary to look at each conference case by case.

With regard to providing support, minor participation costs such as for travel, exhibitions, or presentations do not constitute sponsorship costs, so if these were all NASA paid for, NASA is not a sponsor. Sponsorship entails more significant costs of holding an event, such as paying costs of hosting (e.g., facility rental) or underwriting (e.g., providing funds to a cosponsor or paying for brand awareness at the event) at a level that is more than de minimis, i.e., that is significant rather than trivial. Further, the question whether NASA is a primary sponsor depends on comparing NASA's contribution to that of any other sponsors. For example, NASA is typically not considered a primary sponsor if its contribution is significantly less (e.g., half or less) than the leading sponsors or, even if contributing the most of any sponsor, its relative contribution is minor (e.g., less than 20 percent of the total contributed). NASA is only a primary

sponsor if it was either the conference's only sponsor or one of its principal cosponsors.

Awarding a grant does not necessarily make NASA a sponsor, even if the grantee uses some of the grant funds to host an event that otherwise meets the definition of "conference." A properly awarded grant is program-specific. There is one exception: if the terms of the grant specifically require the grantee to hold the conference, it is likely that NASA is a sponsor.

Finally, one should not assume that use of NASA's logo at a conference means that NASA is a sponsor of the conference; there are other circumstances under which NASA's logo may be legitimately used.

6. Is the total cost to NASA greater than \$20,000?

Note: For a conference to be reportable as "NASA-sponsored," NASA must have been a primary sponsor (see above, FAQ 5-1) and have expended at least \$20,000 on the event, including both travel and non-travel costs. However, even if NASA paid no travel costs, if NASA's other costs for the event exceeded \$20,000 and NASA was a primary sponsor, the event is considered a reportable NASA-sponsored conference.

FAQ 6-1 (Non-NASA costs). Should NASA-sponsored conference costs incurred by other Federal agencies be reported?

Answer : No. Do not report costs of a NASA-sponsored conference that another Government agency ultimately paid. For example, if NASA incurred conference costs but charged them back to another agency via a reimbursable agreement, do not report those costs, since they are not actually NASA costs. Only report those net realized costs shown by NASA's records. For example, do not report fully reimbursable conference travel arrangements; do report the unreimbursed portion of partially reimbursable arrangements.

FAQ 6-2 (Costs: estimates versus disbursements). For conference travel costs, should one report the recorded or estimated cost or the actual amount disbursed?

Answer : Report the amount shown in BW. If disbursements are available, use them. However, since typically reports are required soon after the conference ends, if disbursements are not available, use costs, and if costs are not available, use obligations. In all cases, indicate on the report whether you are using disbursements, costs, or obligations.

FAQ 6-3 (Contractor costs). Should NASA contractors' costs of participating in NASA-sponsored conferences be reported?

Answer : Usually not. Attendance costs of NASA contractors who are not supporting the conference at NASA's specific direction are not reportable. However, all costs of conference support contractors supporting NASA-sponsored conferences are reportable .

FAQ 6-4 (Conference support contractor costs). When reporting costs of NASA-sponsored conferences, should all costs connected with the event's conference support contracts or work orders be included, such as award fees and burden or other indirect charges?

Answer : Yes. If a contractor is helping the NASA sponsor organization plan and/or run the conference under a specific work order, task order, or other contract vehicle and is not simply present at the event as an attendee, the contractor's total conference-related costs are reportable.

7. Is the conference a "foreign conference?"

Note: Congress has prohibited NASA from sending more than 50 NASA employees to any one conference outside the U.S.

FAQ 7-1 (Limit applies regardless of funding availability). If funds are still available, does the 50-person limit on foreign conferences apply?

Answer : Yes. The limit is on how many civil service employees NASA sends, not their costs. Even if NASA's only costs are indirect (e.g., NASA pays employee's salary, but conference sponsor pays his/her travel costs), the attendee still counts against the 50-person limit. Moreover, even if the employee is on leave and pays for all costs in connection with attendance at the conference, the attendee still counts against the 50-person limit if representing NASA (e.g., presenting a paper).

FAQ 7-2 (NASA employees). For purposes of the 50-person limit, are JPL employees considered NASA employees?

Answer : No. Only those persons considered employees for purposes of 5 U.S.C., such as NASA civil service employees and detailees to NASA (for whom NASA is paying costs directly or by reimbursement to the detailing agency) are considered employees.

FAQ 7-3 (Foreign). What is considered "outside the United States?"

Answer : "United States" has the same meaning here as in the FTR, which defines the United States to include the 48 contiguous states, the District of Columbia, and the states and areas defined under the term "Non-Foreign Area," which includes the states of Alaska and Hawaii; the Commonwealths of Puerto Rico, Guam, and the Northern Mariana Islands, and the territories and possessions of the United States (excluding the Trust Territories of the Pacific Islands).

Note: The term "foreign conference" includes conferences held entirely at a NASA facility if the facility is outside the U.S.

FAQ 7-4 (Reimbursable travel). If a NASA employee is requested to present at an international conference and the sponsor pays travel/per diem expenses, does the NASA speaker count against the 50-person limit? What if the employee wishes to give a presentation at or otherwise attend a foreign conference at his or her own expense while on vacation?

Answer : Even if the employee is on reimbursable travel, if NASA is paying the employee's salary during the trip, he or she is considered to be on official travel on behalf of the Government and counts against the limit. Employees are reminded to follow standard procedures for Agency acceptance of travel expenses from outside sources in such cases. (See also FAQ 7-1 above.)

If a NASA employee attends a foreign conference while on vacation, traveling at his or her own expense, and charges no costs to NASA (e.g., for shipping materials), and is not representing NASA (e.g., giving a presentation at all related to NASA or its missions/activities) attendance does not count against the 50-person limit. The limit is on the use of appropriated funds "to send or otherwise pay for attendance" at a conference. However, to ensure accurate records for NASA employee foreign conference attendance, all employees (even those on vacation) planning to attend a foreign conference shall request attendance via NCTS and obtain advance approval from OIIR. In addition, they must follow any requirements related to representing NASA externally. (See NPR 9700.1, Appendix A.)

FAQ 7-5 (Single conference with multiple tracks versus multiple conferences). If several foreign events are held at the same time in the same location but advertised as separate conferences, are they treated as separate conferences for purposes of the 50-person limit?

Answer : It depends. If conferences are structured in key aspects like a single event, they constitute a single conference for purposes of NASA's foreign conference attendance limitation. For example, the AIAA Guidance, Control, and Navigation and the AIAA Modeling and Simulation Technologies Conferences were advertised as separate conferences by AIAA in 2009 and 2010, but both were held at the same time and location, the same registration fee paid admission to sessions from both events, some sessions were listed in the agendas for both conferences, and a single fee could buy a program CD with materials from both events. They essentially functioned as two tracks in a single conference. On the other hand, if conferences are held separately in time (one after the other) and a separate registration fee is charged, they are considered distinct conferences even if held back to back at the same facility by the same sponsor. Similarly, independent meetings not part of the conference, such as those held in advance (like planning sessions) or at the same time (such as independent working group meetings held at the same time to take advantage of key participants being present at the same time and place) are treated as separate events; NASA employees attending these meetings, but not, otherwise, attending the conference are not counted towards the 50-person limit for the conference.

8. How do I obtain approval to attend a conference and process the necessary forms?

FAQ 8-1 (Approval steps). I want to go to a meeting that I think is a conference. How do I obtain approval to attend it, process the authorization, and then file a travel voucher for reimbursement?

Answer :

a. Determine whether the event is a conference and whether it is foreign or NASA-sponsored.

i. If it is clearly not a conference, simply proceed with normal travel authorization and vouchering, no other steps are required by this NPR.

ii. If it is clearly a conference but is neither foreign nor NASA-sponsored, select "conference" in the electronic travel

system Trip Purpose field. Then proceed as usual for travel authorization and vouchering. Do not input the event into NCTS or use an NCTS Identifier; only foreign and NASA-sponsored conferences use NCTS Identifiers.

iii. If the event clearly is a conference and is either foreign or NASA-sponsored (or both), search for the event in NCTS (<http://ncts.nasa.gov>).

b. If it is a conference and foreign or NASA-sponsored, is it listed in NCTS?

i. If it is, note its NCTS Identifier and select that Identifier from the drop-down menu of function codes in the electronic travel system when preparing your travel authorization. Also, be sure to select "conference" as the trip purpose.

ii. If it is not in NCTS, but because it is either foreign or NASA-sponsored you think it should be there, then follow the guidance in 2.7 of this NPR and either submit a new record to NCTS or have one submitted, as your local Center requires.

c. After a new event is input to NCTS, the NCTS moderator will notify the submitter within one working day whether the event is accepted for inclusion in NCTS and if it is, will supply its Identifier and input the event to NCTS. Once you have the NCTS Identifier, follow the steps in 3.b.(i) above.

i. For foreign conferences, submit your travel authorization request to your approver at least five weeks before the planned departure date. After receiving your request, your travel approver will input your name into NCTS to include you on the list of NASA employees who want to attend the conference counting toward the 50-person limit. Your travel approver shall submit this request at least four weeks before the planned departure date. If NASA attendance at the conference is expected to be small, you will be promptly notified that you are within the 50-person limit. For conferences at which NASA attendance is expected to be larger, you may be placed on a "pending" list while OIIR, in consultation with appropriate Agency representatives, determines the final NASA-wide attendance allocation. If you receive official NCTS approval, proceed with your Center/Office's foreign travel process.

Note: NCTS approval simply means that you are approved with regard to the 50-person limit; you must still obtain your supervisor's separate approval for your attendance at the conference.

ii. For both foreign conferences and NASA-sponsored conferences, if after submitting your travel authorization you realize you forgot to use the appropriate function code/NCTS Identifier, then as soon as you realize the omission, file an amended travel authorization using the correct function code.

d. After attending the conference, submit your travel expense report as you normally do, including the NCTS Identifier on it if it is a NASA-sponsored or foreign conference.

Note: Additional information on conference attendance and reporting can be found at the conference Web site, <http://conference.nasa.gov>.

Appendix A: FMR NASA Federal Travel Regulations Supplement (NFTRS)

A.1 The following appendix addresses matters for which NASA has authority or responsibility to set specific policy or establish specific procedures that apply only to NASA and matters not covered by the FTR.

CHAPTER 301 - TEMPORARY DUTY (TDY) TRAVEL ALLOWANCES

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Part 301-2 - General Rules

- § 301-2.1 Must I have authorization to travel?
- § 301-2.5 What travel arrangements require specific authorization or prior approval?
- § 301-2.6 Is a travel authorization required for travel beyond 50 miles when per diem will not be authorized since the official travel is 12 hours or less?
- § 301-2.7 Who has responsibility for monitoring foreign travel policy at NASA Headquarters?
- § 301-2.8 What forms must be submitted for foreign travel?
- § 301-2.9 Must I obtain a "country clearance" before I travel to a foreign country?
- § 301-2.10 Must I complete security training prior to foreign travel?
- § 301-2.11 Do I need to secure an official passport when traveling to a foreign country on official NASA business?
- § 301-2.12 What is "program" foreign travel?
- § 301-2.13 What is "non-program" foreign travel?
- § 301 -2.14 Who can I talk to if I have questions about foreign travel?
- § 301-2.15 Are there any special requirements of which I should be aware?
- § 301-2.16 When should I notify the Office of External Relations (OER) or my Center Foreign Travel Coordinator of my intended travel?
- § 301-2.17 What happens if my intended foreign travel is denied?
- § 301-2.18 How long will it take before I receive notice that my trip has been approved?
- § 301-2.19 What do I do if I am invited to speak, make an appearance, or present a paper while I am traveling abroad on leave?
- § 301-2.20 What is foreign training?

- § 301-2.21 How do I request foreign training?
- § 301-2.22 What is reimbursable travel?
- § 301-2.23 Are there any special requirements for reimbursable travel?
- § 301-2.24 What are the requirements for late travel requests?
- § 301-2.25 What must I do when I return from travel?
- § 301-2.26 What if I am planning to take leave or take my spouse in conjunction with my foreign travel?
- § 301-2.27 What amount should I use for an authorized per diem trip when vouchering from an authorization?
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- § 301-10.9 How do I procure common carrier transportation when I travel by an indirect route?
- § 301-10.10 May I use the city pair program to provide transportation when I travel by an indirect route?
- § 301-10.11 May I use the contractor-issued travel charge card to procure transportation when I travel by an indirect route?
- § 301-10.12 Will NASA pay the cost of transportation between the place I obtain meals and my place of business or my place of lodging when I am performing official travel away from my official station?
- § 301-10.13 Will NASA pay transportation expenses for me to return to my official station on non-work days?
- § 301-10.14 Will NASA pay transportation expenses for me to travel from a leave point to a location where I will perform temporary duty?
- § 301-10.15 Will NASA pay transportation expenses for me to travel from a leave point to my official station if I must interrupt leave to report to my official station?
- § 301-10.16 Will NASA pay transportation expenses for me to travel to my official station if I must interrupt leave to perform temporary duty at my leave point?
- § 301-10.17 Will NASA pay transportation expenses for me to travel from my TDY location to a location other than my TDY location, official station, or residence on non-workdays when I am required to return to the TDY location following the non-workdays?
- § 301-10.18 Will NASA reimburse the full amount of transportation costs (mileage) for local travel?

- § 301-10.19 Will NASA pay the costs of transportation between my residence and common carrier terminals on days when I perform travel by common carrier?
- § 301-10.20 Will NASA pay the cost of transportation from my residence to my office?
- § 301-10.21 Will NASA pay the fee for paper tickets when electronic tickets are available?
- § 301-10.22 How much annual leave may I use in conjunction with official travel?

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- § 301-10.108 What requirements must be met to use a non-contract/are?

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- § 301-10.123 When may I use first -class airline accommodations?
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- § 301-10.183 What classes of ship accommodations must I use?

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- § 301-10.300 When may I use a POV for official travel?

- § 301-10.308 What will I be reimbursed if I park my POV at a common carrier terminal while I am away from my official station?
- § 301-10.309 What will I be reimbursed if I am authorized to use common carrier transportation and I use a POV instead?
- § 301-10.311 When do I need to create a constructive voucher?
- § 301-10.312 How will the allowable cost be determined when I complete an actual and constructive voucher as discussed in 301-10.309 above?
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- § 301-10.406 May I be reimbursed for the hire of a special conveyance from another Government employee, a family member of another Government employee, or a member of my family?
- § 301-10-407 Are NASA employees allowed to use or accept contractor-provided transportation?
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- § 301-10.450 When can I use a rental vehicle?
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- § 301-11.14 How is my daily lodging rate computed when I rent lodging on a long-term basis?
- § 301-11.16 What reimbursement will I receive if I prepay my lodging expenses and my TDY is curtailed, canceled or interrupted for official purposes or for other reasons beyond my control that are acceptable to my Agency?
- § 301-11.21 Will I be reimbursed for per diem or actual expenses on leave or non-workdays (weekend, legal Federal Government holiday, or other scheduled non-workdays) while I am on official travel?
- § 301-11.23 Are there any other circumstances when my Agency may reimburse me to return home or to my official station for non-workdays during my TDY assignment?
- § 301-11.24 What reimbursement will I receive if I voluntarily return home or to my official station on non-workdays during my TDY assignment?
- § 301-11.25 Must I provide receipts to substantiate my claimed travel expenses?
- § 301-11.26 How do I get a per diem rate increased?
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Subpart D - Transportation of Immediate Family Members, Baggage, and Household Goods

- § 303-70.302 When the employee dies at or while in transit to or from his/her official station outside CONUS, must we return the employee's immediate family, baggage and household goods to the residence or alternate destination?
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- § 303-70.400 When an immediate family member, residing with the employee, dies while the employee is stationed outside CONUS, must we furnish mortuary services?

§ 303-70.401 When an immediate family member, residing with the employee, dies while the employee is station outside CONUS, must we pay expenses to transport the remains?

CHAPTER 304 - PAYMENT FROM A NON-FEDERAL SOURCE FOR TRAVEL EXPENSES

Part 304-1 - Acceptance of Payment from a Non-Federal Source for Travel Expenses

§ 304-1.9 What form must we use to report payments received by the Agency from non-federal sources?

CHAPTER 301 - TEMPORARY DUTY (TDY) TRAVEL ALLOWANCES

Subchapter A - Introduction

Part 301-2 - General Rules

§ 301-2.1 **Must I have authorization to travel?**

Yes. See FTR 301-2.1. Refer to NPD 9710.1_, Delegation of Authority - To Authorize or Approve Temporary Duty Travel on Official Business and Related Matters, for more information on who is empowered to authorize TDY travel. NASA Centers' Deputy Chief Financial Officers (DCFOs) shall establish a matrix outlining approving officials by position and authority. NASA-wide approving officials shall include the appropriate levels of management and financial review.

§301-2.5 **What travel arrangements require specific authorization or prior approval?**

You must have a specific authorization or prior approval for:

- A. Use of first-class or business-class service on common carrier transportation;
- B. Use of a foreign air carrier;
- C. Use of reduced fares for group or charter arrangements;
- D. Use of cash to pay for common carrier transportation;
- E. Use of extra-fare train service;
- F. Travel by ship;
- G. Use of a rental car;
- H. Use of a Government aircraft;
- I. Payment of a reduced per diem rate;
- J. Payment of actual expense; (designated approvers will review actual expense to ensure that they are not above the 300 percent of the rate that is published by GSA)
- K. Travel expenses related to emergency travel;
- L. Travel expenses related to travel to a foreign area;

M. Acceptance of payment from a non-Federal source for travel expenses, and

N. Travel expenses related to attendance at a conference.

Note to §301-2.5: Paragraphs (c), (i), (m), and (n) of this section require a written or electronic advance authorization.

§
301-2.6 **Is a travel authorization required for travel beyond 50 miles when per diem will not be authorized since the official travel is 12 hours or less?**

A. No, a travel authorization is not required when a POV is authorized. A local voucher may be used to claim mileage expenses, tolls, and parking.

B. Yes, a travel authorization is required when air transportation or government provided transportation (i.e. vehicle, aircraft) is used. A TDY travel voucher may be submitted for mileage expense, tolls, and parking. For travel that exceeds 12 hours, per diem may be claimed. See FTR 301-70.102(h)

§
301-2.7 **Who has responsibility for monitoring foreign travel policy at NASA Headquarters?**

The Office of External Relations (OER) is responsible for review and coordination of all foreign travel by NASA personnel (see NPD 9701.1). With the exception of Astronaut travel, OER has delegated review and final approval of all Center foreign travel to the NASA Centers. OER will review and approve all astronaut travel. OER will continue to coordinate, review, and approve all Headquarters foreign travel. Center Foreign Travel Coordinators will submit weekly foreign travel reports to OER.

Each Center Director and NASA Mission Directorate will appoint a Foreign Travel Coordinator to serve as a single point of contact. Foreign Travel Coordinators are responsible for ensuring compliance with all applicable federal and NASA foreign travel policies and procedures.

§
301-2.8 **What forms must be submitted to the OER for foreign travel review and coordination?**

The following forms should be submitted in advance of travel as applicable:

A. Advance Notification Form

B. Travel Authorization (See Subpart B Travel Authorization 301-71.103)

C. NASA Form 1676, "NASA Scientific and Technical Document Availability Authorization (DAA)"

D. NASA Form 1167, "Request for Approval of Foreign Training, Non-Program

E. Travel or Gifts of Travel from Non-Federal Sources"

The submission must include, but is not limited to, the following; background information, the letter of invitation(s) and purpose of the trip, the program or agenda, the Uniform Resource Locator (URL) for the conference web site (if applicable), copy of legal review of all reimbursable travel, and a copy of the appropriate reviewing OER official.

§ **Must I obtain a "country clearance" before I travel to a foreign**
301-2.9 **country?**

Yes. All official foreign travel by NASA personnel, regardless of purpose, requires that NASA request a "country clearance" through the Department of State. The OER has delegated this function to a core group of personnel at the NASA Centers and Headquarters.

§ **Must I complete security training prior to foreign travel?**
301-2.10

Yes. If you are performing extended foreign travel, you must complete the Mandatory Personal Security Training for Extended TDY. Department of State Cable (STATE 066580) dated March 24, 2004, requires the Chief of Mission (COM) ensure that all American personnel traveling to post on permanent assignment and TDY of 30 days or more, have completed mandatory security training. This requirement applies to U.S. Government civil servants and U.S. Government contractors traveling to an overseas destination for a permanent assignment or TDY of 30 days or more (cumulative in a year). Effective January 1, 2005, American personnel requesting country clearance to perform extended temporary duty at an overseas location must complete the appropriate overseas personal training prior to travel. The training is required every five years. All requests for country clearance will be contingent upon completion of this training and clearance request for employees who have not met this requirement may be denied and travel may not take place. Your Center Human Resources Office will have training date/venue information.

§ **Do I need to secure an official passport when traveling to a**
301-2.11 **foreign country on official NASA business?**

Yes. Title 22 of the Code of Federal Regulations, Section 51.3(b) states: "An official passport is issued to an official or employee of the U.S. Government proceeding abroad in the discharge of official duties. Where appropriate, dependents of such persons may be issued official passports."

Additionally, the Department of State requires that travelers on official U.S. government business travel obtain a valid official

passport. The exception to this rule is Taiwan, which requires specific considerations. The official passport must be valid at least 6 months after the planned trip end date. However, there are some instances where the official passport must be valid up to 12 months (e.g. multiple entries into Russia) after the planned trip end date. Additionally, visas may be required to permit entry into foreign countries to persons traveling abroad on behalf of the U.S. Government. It is the traveler's responsibility to ensure that the validity of their passport expiration dates meets the applicable requirements and that appropriate visas have been obtained prior to travel commencing. Contact your Center's Passport/Visa office for specific information. This information may also be found on the Foreign Travel Portal.

§ **What is "program" foreign travel?**

301-2.12

Program foreign travel is travel related to supporting a relationship and/or activities between NASA and a foreign government or entity that are governed by an existing International Space Act agreement, Memorandum of Understanding, letter agreement, or a contract with a foreign entity. These are directly related to and support a specific mission/project such as the International Space Station, and include flight readiness, and critical design reviews, joint science/mission working groups, technical interchange meetings, launch and landing, and vendor meetings on specific contracts, etc. The program/agreement in question should be referenced in the paperwork supporting the request for permission to travel.

All other foreign travel is non-program travel.

§ **What is "non-program" foreign travel?**

301-2.13

Non-program foreign travel is travel for the purposes of attending conferences, symposia, and workshops, planning meetings supporting international collaboration (such as the World Space Congress, or the American Geophysics Union), or conducting exploratory dialogues or preliminary discussions on the potential cooperative projects or activities with foreign entities.

In instances where a particular trip mixes "program" and "non-program" purposes, the procedures for "non-program" travel are to be followed (i.e., a NASA Form 1167 is required for the entire trip).

§ **Who can I talk to if I have questions about foreign travel?**

301-2.14

The OER at NASA Headquarters and your Center's Foreign Travel Coordinator. Additional information pertaining to travel outside the United States can be found on the Foreign Travel Portal; <http://www.usa.gov/Citizen/Topics>
<http://www.usa.gov/Citizen/Topics/Travel/International.shtml>

§ **Are there any special requirements of which I should be aware?**

301-2.15

Yes.

A. If your travel will involve support from a U.S. Embassy or Consulate, discussions with senior representatives of foreign governmental organizations, discussions intended to lead to international cooperation or shipment or hand-carrying of equipment, you should contact the OER at NASA Headquarters well in advance of the travel.

B. If travel is for activities that require an international agreement that does not already exist, the travel may be denied or postponed pending review of the proposed activity or negotiation and execution of an international agreement. OER approval of foreign travel is contingent upon approval from the Department of State, and may be denied in consultation with the Department of State and the NASA Office of Security and Program Protection.

C. Individuals planning foreign travel, and who hold special security clearances providing access to a NASA Special Access Program (SAP) or Sensitive Compartmented Information (SCI), must advise the appropriate program security officer or the NASA Special Security Officer (SSO) prior to travel. If the individual is unsure whether or not they hold such access, which imposes this requirement, they should contact the Office of Security and Program Protection (OSPP) at NASA Headquarters.

D. Foreign travel regardless of duration and security clearance may require a security/counterintelligence pre-brief and/or subsequent debrief, depending upon the country.

§ **When should I notify the OER or my Center Foreign Travel Coordinator of my Intended travel?**

301-2.16

Foreign travel requests should be submitted to the cognizant office (OER for Headquarters travel and the Center Foreign Travel Coordinator for travel at the Centers) 4 weeks before the planned departure date due to the requirement for the State Department process for country clearance. The NASA Advance Notification Form is used to transmit this information via email to the appropriate office. There will be a presumption of denial for any foreign travel request received 10 days or less before a planned departure; approvals in such cases will be dependent upon the justification and made on a case-by-case basis via the Late Notice Justification Form. A Late Notice Justification Form is required for travel requests made within 3 weeks or less prior to departure. Justification for travel authorizations received 3 weeks or less before planned departure must be signed by the Center Director or designated individual at your NASA Center. Final approval is

contingent upon a country clearance from the State Department.

§ **What happens if my intended foreign travel is denied?**

301-2.17

The OER at NASA Headquarters will advise the Center's Foreign Travel Coordinator of travel denied by OER. In such instances, the reason for denial will be provided and the trip will either be cancelled or rescheduled, depending upon the circumstances. All rescheduled or amended travel will require revised travel requests. Center Foreign Travel Coordinators will keep travelers apprised of the status of their travel requests.

§ **How long will it take before I receive notice that my trip has been approved?**

301-2.18

Once the travel authorization has been approved through the routing process you will be notified electronically through the travel system. The Center Travel office can provide the status of the authorization.

§ **What do I do if I am invited to speak, make an appearance, or present a paper while I am traveling abroad on leave?**

301-2.19

Any time you are representing NASA, or conveying information obtained from or related to your NASA position, you are acting in an official NASA capacity and must obtain approval from the Center Director or his designee, as appropriate. Center Foreign Travel Coordinators will request concurrence of the OER at NASA Headquarters in accordance with the mission of OER. The cognizant official will request approval using NASA Form 1167. Approval to accept such an invitation shall be communicated to the employee, after review by the OER. Employees authorized to accept such an invitation will be considered on duty status during such time. Approval will be confirmed by preparation of the travel authorization. See also, 5 CFR 6901.103

§ **What is foreign training?**

301-2.20

Foreign training is instruction, education, or a structured development experience provided by foreign institutions or facilities located outside the United States and its possessions. The OER must review all foreign training pursuant to NPD 3410.2.

§ **How do I request foreign training?**

301-2.21

You must first establish the availability of NASA funds for both the foreign training and travel. Once funding is established, requests are submitted to the Office of Human Capital Management, NASA Headquarters 6 months before the proposed date of departure. NASA Form 1167 should be prepared for submittal. All foreign training must be forwarded to OER at NASA Headquarters for review prior to approval.

§ What is reimbursable travel?

301-2.22

Reimbursable travel is travel for which a non-Federal source provides all or a portion of the funding for travel expenses, either directly to the Agency or in-kind to the employee. NASA employees should not accept direct payment of expenses. If a payment is received, it must be promptly reported to the Deputy Chief Financial Officer (DCFO) at your Center.

§ Are there any special requirements for reimbursable travel?

301-2.23

All travel involving full or partial reimbursement from a non-Federal source must be reviewed and approved in writing by the Office of the Chief Counsel at your Center or the Office of General Counsel at Headquarters. Responses to travel invitations from foreign entities that involve reimbursement must be coordinated with the OER at NASA Headquarters. Reimbursable travel must be approved in advance of travel.

§ What are the requirements for late travel requests?

301-2.24

See 301-2.16.

§ What must I do when I return from travel?

301-2.25

You must complete and submit your travel voucher no later than 5 business days once the travel has been completed. Reports or summaries of your activities on foreign travel may be required. Should a trip report be required, the OER will advise the traveler by email or NASA Form 1167 for non-program travel, and will communicate trip report requirements for program travel to the Center Travel Coordinator, or for HQ employee's, to the employee's office or the employee directly. If the traveler is involved in an unusual incident, or suspects an unusual attempt by a foreign national to collect information, the traveler is required to report the incident to the Center counterintelligence personnel immediately upon return.

§ What if I am planning to take leave or take my spouse or children in conjunction with my foreign travel?

301-2.26

If you plan to take leave or if you plan to take your spouse or children on the trip, and you are making personal reservations for the leave portion of the travel or for family member travel, ensure the appropriate officials have reviewed and approved the trip, and the Department of State has granted country clearance prior to making any personal travel arrangements. If you make personal travel arrangements for yourself and/or for family members that are non-refundable, such arrangements are at your own risk.

§ 301-2.27 What amount should I use for an authorized per diem trip when vouchering from an Authorization?

On the authorized trip, the per diem lodging rate on the travel voucher should be the applicable per diem rate for the TDY location as prescribed by GSA.

§ **How much annual and/or other leave may I use in conjunction**
301-2.28 **with official travel?**

Any leave in conjunction with travel must be approved by the traveler's supervisor prior to travel commencing. Employees and approving officials should be aware of the appearance of or impropriety of taking extensive personal leave in conjunction with official travel.

Subchapter B - Allowable Travel Expenses

Subpart A - General

§ **How do I procure common carrier transportation when I travel**
301-10.9 **by an indirect route?**

You must procure a ticket for travel by the direct route using the authorized method of payment through the Travel Management Center (TMC). You then must exchange the ticket for a new ticket by the indirect route. If the ticket for travel by the indirect route is of lesser value, you must follow the procedures in § 301-10.118 of this part. If the ticket for travel by the indirect route is a greater value, you must pay the carrier using personal funds.

§ **May I use the city pair program to provide transportation**
301-10.10 **when I travel by an indirect route?**

No. You may not use city pair rates for legs of travel, which are made by an indirect route. You may, however, use the city pair rates for legs of travel by the direct route, even if another portion of your travel will be by an indirect route.

§ 301-1 **May I use the contractor-issued travel charge card to procure**
0.11 **transportation when I travel by an indirect route?**

No.

§ **Will NASA pay the cost of transportation between the place I**
301-10.12 **obtain meals and my place of business or my place of lodging**
when I am performing official travel away from my official
station?

No, unless you cannot obtain adequate meals at or near your place of lodging or your place of business. You are to use the M&IE portion of the lodging plus per diem allowance to cover these expenses.

§ **Will NASA pay transportation expenses for me to return to my**
301-10.13 **official station on non-work days?**

NASA will pay as follows:

If...	NASA will pay...
You are authorized a return trip home under the following circumstances:	Your actual transportation expenses.
NASA requires you to return to your official station to perform official business or because it otherwise is advantageous to the Government;	
NASA will realize a substantial cost savings by returning you home; or	
Periodic return travel home is justified incident to an extended TDY assignment. Travelers are authorized trips home an average of every 3 weeks, NTE 17 trips per a one year assignment or the prorated equivalent rounded down for trips of a lesser duration. (See 301-11.221)	

§ 301-1 **Will NASA pay transportation expenses for me to travel from a leave point to a location where I will perform temporary duty?**
 0.14

As follows:

If upon completion of your temporary duty assignment you return to...	NASA will pay...
Your leave point,	Your transportation costs from your leave point to your temporary duty site and return to your leave point.
Your official station,	Your transportation cost limited to the cost of travel by a direct route or an uninterrupted basis. You will be responsible for any additional costs.

§ 301-1 **Will NASA pay transportation expenses for me to travel from a leave point to my official station if I must interrupt leave to report to my official station?**
 0.15

No, not unless you return to your leave point and immediately resume leave after completion of the assignment. In this circumstance, NASA will pay from the place of leave to the official station and return to the place of leave.

§ 301-1 **Will NASA pay transportation expenses for me to travel to my**
0.1 6 **official station if I must interrupt leave to perform temporary**
duty at my leave point?

No, because you have not incurred any additional transportation expenses in this situation.

§ **Will NASA pay transportation expenses for me to travel from my**
301-1 **TDY location to a location other than my TDY location, official**
0.1 7 **station, or residence on non-workdays when I am required to**
return to the TDY location following the non-workdays?

NASA will pay any transportation expenses or lodging expenses incurred limited to the amount of daily lodging expenses you incurred on the previous days at your TDY location. If you return to your official station, you will not be reimbursed any M&IE expenses. Your travel must be performed during non-duty hours or you must take leave.

§ 301-1 **Will NASA reimburse the full amount of transportation costs**
0.18 **(mileage) for local travel?**

Yes.

§ 301-1 **Will NASA pay the costs of transportation between my**
0.19 **residence and common carrier terminals on days when I**
perform travel by common carrier?

Yes, NASA will pay the costs of transportation for:

A. Travel from your residence to a common carrier terminal on the day of departure from your official station; and

B. Travel from the common carrier terminal to your residence on day of arrival at your official station.

§ 301-1 **Will NASA pay the cost of transportation from my residence**
0.20 **to my office?**

No, unless:

A. You are provided a transit subsidy under § 629 of Pub. L. 103-172;

B. You are authorized home-to-work transportation under 31 U.S.C. 1344;

C. You require transportation on the day you depart for travel and:

(1) Your trip will last 2 or more days (requiring at least one night's lodging);

(2) You are not able to perform your commute by your normal mode of transportation; and

(3) Your use of the alternate mode of transportation results in an increase in your commuting costs.

D. You require transportation on the day you return from travel lasting two or more days, and:

(1) You are not able to perform your commute by your normal mode of transportation; and

(2) Your use of the alternate mode of transportation results in an increase in your commuting costs; or

E. You require transportation because of necessity as provided in FTR 301-10.420(d).

§ **Will NASA pay the fee for paper tickets when electronic tickets**
301-1 **are available?**
0.21

No. If there is an electronic ticket available for reservations in domestic markets the fee is not a reimbursable expense. However, if you wish to receive a paper ticket for your personal convenience the additional expense you incur will be borne by you. The approving official, on a case-by-case basis, will consider any exceptions to this policy.

Payment of the paper ticket fee in International markets is considered a reasonable expense and will be reimbursed to the traveler.

Leave in Association with TDY:

§ **How much annual leave may I use in conjunction with official**
301-10.22 **travel?**

Any leave in conjunction with travel must be approved by the traveler's supervisor prior to travel commencing. Employees and approving officials should be aware of the appearance of or impropriety of taking extensive personal leave in conjunction with official travel.

Non CPP Approval:

- § **What requirements must be met to use a non-contract fare?**
301-10.108
- A. Before purchasing a non-contract fare you must meet one of the exceptions listed in §301-10.107 and show approval on your travel authorization to use a non-contract fare.
- B. If the non-contract fare is non-refundable, restricted, or has specific eligibility requirements, you must know or reasonably anticipate, based on your planned trip, that you will use the ticket.
- C. NASA must determine that the proposed non-contract transportation is practical and cost effective for the Government.

Note to §301-10.108: Carrier preference is not a valid reason for

using a non-contract fare.

In addition to meeting the above requirements the Deputy Chief Financial Officer (Finance) or his/her designee at your Center must determine that the proposed noncontract transportation is practical and cost effective for the Government.

Subpart B - Common Carrier Transportation

§ **What must I do if I change or do not use a common carrier reservation?**
301-10.113

If you know you will not use a reservation, you must cancel it within the time limits specified by the carrier. If the transportation furnished is different or of lesser value than authorized on the ticket, or your trip ends short of the destination specified on your authorization, the Government is due a refund. You must report these facts and account for your actions on your travel voucher in order to prevent losses to the Government. Failure to do so may subject you to liability for any resulting losses.

§ **What must I do with unused ticket(s) or refund application(s)?**
301-10.114

You must notify the Center Travel Office or its designee as soon as possible so that the appropriate credits can be processed. Unused paper tickets or coupons must be returned to the Center Travel Office for a refund to be processed.

§ **What must I do with compensation an airline gives me if it denies me a seat on a plane?**
301-10.116

If you are performing official travel and a carrier denies you a confirmed reserved seat on a plane, you must give NASA any payment you receive for liquidated damages. You must ensure the carrier shows the "Treasurer of the United States" as payee on the compensation check and then forward the payment as instructed by your Center's DCFO office.

§ **What must I do if I am issued a ticket and exchange that ticket for a lesser value ticket that I use?**
301-10.118

As follows:

If you purchased the original ticket using...	Then you must...
---	------------------

<p>Your contractor-issued travel charge card or in cases when the total amount is less than \$100 by cash</p>	
	<p>Obtain a refund by crediting your account (or receiving cash), and then, claiming the lesser value ticket on your travel claim. You must also submit your ticket receipt for the lesser value ticket. If it is not possible to get a credit to your account, you may submit a ticket refund application as instructed by your Center's DCFO office.</p>
<p>Centrally billed account</p>	<p>Request a receipt, ticket refund application, or other written acknowledgment of fare adjustment from the carrier (You are not authorized to receive a refund, credit, or any other negotiable document from a carrier);</p>
	<p>Furnish the carrier a "bill charges to" address;</p>
	<p>Submit the receipt, ticket refund application or other written acknowledgment of fare adjustment payment as instructed by your Center's DCFO.</p>
<p>File a</p>	<p>travel claim without a request for reimbursement for transportation expenses since the Government pays the charges directly to the carrier.</p>

§ **What must I do if I am issued a ticket and exchange that ticket for a more expensive ticket which I use?**
 301-10.119

If the increase is due to travel by an indirect route, you must pay the difference using personal funds. If the increase is due to official travel, you must do the following:

<p>If you purchased the original ticket using...</p>	<p>Then you must...</p>
--	-------------------------

Your contractor-issued travel charge card,	Pay for your new ticket using your contractor-issued travel charge card
Centrally billed account	<p>Contact your Travel Management Committee (TMC)</p> <p>Pay for your new ticket using your contractor-issued travel charge card if you did not use a TMC or cannot access your TMC; or</p> <p>Pay for your new ticket using cash only if you cannot use your TMC or contractor-issued travel charge card.</p>

Airline Accommodations

§ **When may I use first-class airline accommodations?**
 301-10.123

Only when NASA specifically authorizes these accommodations as identified in FTR 301-10.123. Authorization for first or premium class accommodations shall be at the Center Director and higher level or designee. Agency reporting requirements for first-class travel shall comply with FTR 300-70.100.

When first-class accommodation is authorized, FTR 301-13.2(b) requires the condition be substantiated in writing by a medical authority. This is not intended to be an open-ended approval for other than coach class travel. The condition should be substantiated on a regular basis at minimum annually.

§ **When may I use premium-class other than first-class airline accommodations?**
 301-10.124

Only when NASA specifically authorizes these accommodations identified in paragraphs FTR 301-10.124. Authorization for premium class accommodations shall be at the Center Director and higher level or designee. Agency reporting requirements for first-class travel shall comply with FTR 300-70.100.

When premium other than first-class accommodation is authorized, FTR 301-13.2(b) requires the condition be substantiated in writing by a medical authority. This is not intended to be an open-ended approval for other than coach class travel. The condition should be substantiated on a regular basis at minimum annually.

Train

§ 301-1 When may I use first-class train accommodations?

0.162

Only when NASA specifically authorizes your use of first-class train accommodations under paragraphs (a) through (d) FTR 301-10.162.

In regard to FTR 301-10.162(b), a special need must be justified in writing and shown on the travel authorization.

Ship**§ What classes of ship accommodations must I use?**

301-10.183

You must use the lowest first class accommodations when traveling by ship, except when NASA specifically authorizes your use of first-class ship accommodations under paragraphs (a) through (c) of FTR 301-10.183.

In regard to FTR 301-10.183(b), a special need must be justified in writing and shown on the travel authorization.

Subpart D - Privately Owned Vehicle (POV)**§ When may I use a POV for official travel?**

301-10.300

You may use a POV to perform official travel, including local travel; however, NASA will limit its payment for your travel expenses if you are not authorized to use a POV.

§ 301-1 What will I be reimbursed if I park my POV at a common carrier terminal while I am away from my official station?

0.308

NASA may reimburse your parking fee as an allowable transportation expense not to exceed the cost of taxi fare to/from the terminal. As a prudent traveler, you should use satellite parking facilities rather than daily or valet parking facilities.

§ What will I be reimbursed if I am authorized to use common carrier transportation and I use a POV instead?

301-1

0.309

You will be reimbursed on a mileage basis (see FTR 301-10.303), for the actual travel performed plus per Diem, not to exceed the total for the constructive voucher of the authorized method. You must determine total cost for the constructive voucher as follows:

A. Mode of travel to be used for comparison.

(1) Airplane. When NASA authorizes air travel, your mileage payment may not exceed the constructive cost of coach-class accommodations on a commercial air carrier. You must use city pair rates as your basis of comparison if it is provided between the points involved; otherwise use the lowest unrestricted coach-class fare. You should consider coach-class accommodations as being provided by a carrier if they are

scheduled on flights between the points involved; whether they would have been available at the time of your travel is irrelevant.

(2) Train. When NASA authorizes train travel, your mileage payment may not exceed the constructive cost of coach-class train accommodations for the travel performed unless NASA has authorized extra-fare train service as advantageous to the Government.

(3) Bus. When NASA authorizes inter-city bus travel, your mileage payment may not exceed the constructive cost of bus transportation.

B. Costs to be included in your constructive voucher:

(1) Costs to and from common carrier terminals;

(2) Cost of excess baggage not included that would have been allowed by your authorized mode (you must provide acceptable evidence of its weight).

(3) Transportation in and around the TDY location

(4) Rental car expense if it would have been allowed by your authorized mode

C. Per diem allowance.

The constructive per diem allowance is the amount that would have been allowable had you used the authorized method of transportation; the maximum per diem established by GSA for the location of the assignment.

D. Use of actual and reasonable schedules.

In constructing your cost, use reasonable departure/arrival schedules and avoid those that would cause undue inconvenience, adversely affect your safety, or unduly increase your constructive subsistence cost. (For this purpose, "unreasonable hours" means departing or arriving between the hours of 10:00PM to 6:00AM).

E. Leave.

Leave will be charged for the additional travel time required during normal working hours in excess of the time which would have been required by the mode of transportation used in determining constructive vouchers.

§ **When do I need to create a constructive voucher?**

301-10.311

A constructive voucher is needed when the traveler did not use the preferred method of transportation.

§
301-10.312 **How will the allowable cost for per diem and transportation be determined when I complete an actual and constructive voucher as discussed in 301-10.309 above?**

The constructive voucher for the entire trip will be compared with the actual cost of the travel as performed for the entire trip.

§
301-10.313 **Are rental car expenses allowed in my constructive voucher if a rental car was authorized on my travel authorization?**

Yes. Rental car expenses are allowed in the constructive voucher.

Subpart E - Special Conveyances

§
301-10.404 **May NASA require me to travel with other employees in a special conveyance?**

In instances where there are groups of NASA employees at the same TDY location and all are in need of rented transportation, authorizing officials may require individuals to share the use of a rental car to the maximum extent reasonable.

§
301-10.405 **What must I do if I travel with other employees in a special conveyance?**

You must record the name of each employee and his or her employing office on your travel claim.

§
301-10.406 **May I be reimbursed for the hire of a special conveyance from another Government employee, a family member of another Government employee, or a member of my family?**

Only if you satisfactorily show that:

A. The conveyance was not procured because of a personal or official relationship; and

B. If procured from a member of your family, that the family member was not dependent upon you for support.

§
301-10-407 **Are NASA employees allowed to use or accept contractor-provided transportation?**

NASA employees will NOT:

A. Use contractor-owned vehicles, including aircraft.

B. Accept contractor-provided transportation, except for travel related expenses accepted by NASA under the authority of 31 U.S.C. §1353 in connection with an employee's attendance at a meeting or similar function relating to official duties which takes place away from the duty station. NASA's acceptance must be in accordance with the implementing regulations at 41 CFR part 304-1.

C. Request special transportation services from a contractor either to or from an airport, railroad station, or any other transportation points.

For more information consult the Standards of Ethical Conduct for Employees of the Executive Branch.

§
301-10.408 **Are contractors allowed to use or accept NASA-provided transportation?**

In the course of performing official Government business contractors:

A. May accompany a NASA employee in a Government vehicle, rental car, or privately owned vehicle.

B. Are allowed to drive Government vehicles either alone or accompanying other NASA employees.

Taxicabs, Shuttle Services, or Other Courtesy Transportation

§
301-10.420 **When may I use a taxi or shuttle service?**

A. Local Travel.

(1) When authorized, NASA will reimburse the full amount of transportation costs (mileage) for local travel.

B. To and from a Carrier Terminal.

a. Travel from your residence to a common carrier terminal on the day of departure from your official station; and

b. Travel from the common carrier terminal to your residence on the day of arrival at your official station.

C. Between Residence and Office on Day You Perform Official Travel.

NASA will not pay the transportation costs, unless:

(1) You are provided a transit subsidy under § 629 of Pub. L. 103-172;

(2) You are authorized home-to-work transportation under 31 U.S.C. §1344;

(3) You require transportation on the day you depart for travel and:

a. Your trip will last 2 or more days (requiring at least one night's lodging);

b. You are not able to perform your commute by your normal mode of transportation; and

c. Your use of the alternate mode of transportation results in an increase in your commuting costs.

(4) You require transportation on the day you return from travel lasting 2 or more days; and

a. You are not able to perform your commute by your normal mode of transportation; and

b. Your use of the alternate mode of transportation results in an increase in your commuting costs; or

(5) You require transportation because of necessity as provided in FTR 301-10.420(d).

§ **How much will my Agency reimburse me for a tip to a taxi, shuttle service, or courtesy transportation driver?**
301-10.421

NASA has determined that a reasonable tip for commercially operated local transportation such as a taxi is a maximum of 15 percent of the fare. For Courtesy transportation service a reasonable tip is generally not more than \$2.00. If you benefit from exceptional service, you may always tip the provider more than these reasonable amounts with the understanding that it is from your personal funds, since you are the beneficiary of the exceptional service.

§ **When can I use a rental vehicle?**
301-10.450

The use of a rental vehicle must be advantageous to NASA and must be specifically authorized. Intermediate cars are the standard size rental cars to be authorized for TDY. Any upgrade should be authorized prior to commencement of travel. If other than an intermediate car is requested, justification is required stating that the traveler(s) meet one of the following conditions:

- A. Three or more travelers using one rental vehicle
- B. Medical disability
- C. Physical need for additional space
- D. Weather conditions at the TDY location
- E. The default preferred car is not available
- F. Terrain conditions at TDY

Additional justification is required for other than the lowest cost rental car company at the TDY location (airport terminal).

NOTE: You may upgrade your vehicle at your personal expense, including through redemption of promotional benefits.

§ Will NASA pay for damages to a commercial rental car?
301-10.454 Yes, only in instances where damages occur while the car is being used for official purposes and being driven by authorized travelers. See Financial Management Requirements, Volume 15, Cash Management (Disbursing).

When you are required to pay for damages to an authorized commercial rented vehicle from personal funds, you may be reimbursed in an amount up to the amount deductible on the insurance included as part of the rental contract without additional charge.

The rental car company must bill NASA for any damages it believes the employee caused that are not covered under the terms of the contract. Should the rental car company try to bill the employee, the employee should contact the TMC office that arranged the rental and the national office of the rental car company. An investigation of the accident will be conducted and if it reveals the damage was incurred through negligence, improper, or personal use of the vehicle, NASA may collect the cost of damages from the employee.

§ **Will NASA pay for damages that occur to my privately owned vehicle while I am on official travel?**
301-10.455

Yes, if you are authorized a POV as advantageous to the government. Each authorization is to be supported by a cost comparison indicating that the approval of such expenses is warranted. Reimbursement is limited to the amount of your insurance deductible.

Part 301-11 - Per Diem Expenses

Subpart A - General Rules

§ **When am I eligible for an allowance (per diem or actual expenses)?**
301-11.1

When you meet the criteria in FTR 301-11.1 and, if you are stationed in the Washington DC area, your temporary duty site is:

- A. 25 miles or more from your residence; and
- B. 25 miles or more from your office.

NASA's local travel policy has been established as follows: No lodging or subsistence will be authorized within 50 miles of both the employee's official duty station and the residence from which the employee commutes to the official duty station. An exception is allowed for training purposes authorized by each Center's Training and Development Division as qualifying under 5 U.S.C. § 4109(2) and when it has been determined that overnight stays and attendance

at meals are necessary in order to achieve the objectives of the training. Training funds must be used in these circumstances. An exception is allowed for travelers, who will be required to be at the location for more than 12 hours, but distance is less than 50 miles and travel to/from their official duty station or their residence would be during unreasonable hours. (10:00 p.m. -6:00 a.m.)

For travel in excess of 50 miles of both the employee's official duty station and commuting residence, the temporary duty travel regulations apply. The official duty station is defined by the boundaries of the Center.

Travel authorizations are not required when it is known that an employee will not be in a travel status for more than 12 hours and therefore will be filing a local voucher to claim mileage, parking, tolls, etc., e.g. Inspector General Investigators.

Exception to FTR 301-11.1(c), per diem shall not be allowed for employees who qualify for per diem solely on the basis of working a non-standard workday (e.g. four 10-hour days, a first forty-hour workweek or other compressed or flexible schedule). In such instances, per diem shall not be allowed for travel periods less than or equal to the employee's scheduled workday hours plus two hours.

§
301-11.3 **Must my Agency pay an allowance (either a per diem allowance or actual expenses)?**

Yes, unless your agreement for attending a training event for which you "agree not to be paid per diem expenses" or payment of per diem expenses are not authorized. See FTR 301-11.3

§
301-11.8 **What is the maximum per diem rate I will receive if lodging is not available at my TDY location?**

If lodging is not available at your TDY location, NASA may authorize or approve the maximum per diem rate for the location where lodging is obtained. If NASA does not authorized or approve the maximum per diem rate for the location where lodging is obtained, you will receive the lodging amount for your TDY location.

§
301-11.11 **How do I make my lodging reservations?**

Lodging reservations must be made consistent with guidance outline in FTR 301-11.11. The lodging choice must be FEMA certified.

See: <http://www.usfa.fema.gov/hotel> for lodging facilities approved by FEMA as "approved accommodations." Lodging reimbursement will be limited to the per diem amount unless actuals have been authorized. (FTR 301-50.3)

§ **How is my daily lodging rate computed when I rent lodging on**
301-11.14 **a long-term basis?**

See FTR 301-11.14. When you obtain lodging on a long term basis (e.g. weekly or monthly) your daily lodging rate is computed by dividing the total lodging cost by the number of days occupancy for which you are entitled to per diem, provided the cost does not exceed the daily rate of conventional lodging. Otherwise the daily lodging cost is computed by dividing the total lodging cost by the number of days in the rental period. Reimbursement, including an appropriate amount for M&IE, may not exceed the maximum daily per diem rate for the TDY location.

§ **What reimbursement will I receive if I prepay my lodging**
301-11.16 **expenses and my TDY is curtailed, canceled or interrupted for official purposes or for other reasons beyond my control that are acceptable to my Agency?**

See FTR 301-11.16. If you acted reasonably and prudently in incurring the expense, and sought to obtain a refund or otherwise took steps to minimize the cost, you maybe reimbursed expenses that are not refundable, including a forfeited rental deposit. NASA will not pay your expenses if you did not try to obtain a refund, if you did not take steps to minimize the costs, or if you did not act reasonably and prudently in incurring the prepaid lodging expenses.

Employees who are authorized per-diem while on temporary duty, who travel on official business outside the local commuting area can request a travel authorization for dual lodging expenses in order to defray the cost of maintaining dual temporary lodging. Reimbursement is limited to the lodging expenses at the prior location and the regular lodging and per diem at the current station. It does not authorize payment of dual per diem for a specific day, but does authorize reimbursement of the expenses incurred for dual lodging only. Travelers on extended TDY will be limited to the fixed lodging costs. Receipts are required for all dual lodging claims.

§ **Will I be reimbursed for per diem or actual expenses on leave**
301-11.21 **or non-workdays (weekend, legal Federal Government holiday, or other scheduled non-workdays) while I am on official travel?**

A. Return to your official station or to the home from which you commute to your official station.

B. Are in a paid or non-paid non-work status, other than sick leave, at the end of the workday before the non-workday(s) and at the beginning of the workday following the non-workday(s).

C. Take leave, other than sick leave, for all of the prescribed

working hours since your previous non-workday.

See FTR 301-11.21. NASA will not pay an allowance for subsistence expenses for any paid or non-paid non-work status during your prescribed working hours unless emergency travel is involved due to an incapacitating illness or injury, in which case the rules in FTR 301-30 govern. NASA will not pay an allowance for subsistence expenses on a non-workday unless you:

Travel to Permanent Duty Station

§
301-11.23 **Are there any other circumstances when my Agency may reimburse me to return home or to my official station/or non-workdays during my TDY assignment?**

You return home voluntarily even though you are not authorized a return trip home

Your actual transportation expenses, not to exceed what NASA would have paid you for subsistence expenses under § 301-11.23 of part 301-11 of this chapter if you had remained at your temporary duty location

§
301-11.24 **What reimbursement will I receive if I voluntarily return home or to my official station on non-workdays during my TDY assignment?**

See FTR 301-11.24. NASA will not pay an allowance for per diem or actual expenses while you are at your home or official station.

§
301-11.25 **Must I provide receipts to substantiate my claimed travel expenses?**

Yes. You must provide a lodging receipt and a receipt from the vendor for every authorized expense over \$75, or provide a reason acceptable to NASA explaining why you are unable to furnish the necessary receipt(s). See also FTR § 301-52.4.

Note to 301-11.25: Hard copy receipts should be electronically scanned and submitted with your electronic travel claim when your agency has fully deployed ETS and notifies you that electronic scanning is available within your agency (see FTR § 301-50.2 and 301-50.3). You must retain receipts to support a claimed travel expense while electronic imaging is not available.

§ 301-11.26 **How do I get a per diem rate increased?**

For permanent per diem rate changes in a particular locality see FTR 301-11.26.

§ **Are taxes included in the lodging portion of the Government**
301-11.27 **per diem rate?**

No. Lodging taxes are reimbursable as a miscellaneous travel expense limited to the taxes on reimbursable lodging costs. This regulation applies to both the full and reduced per diem rate in the CONUS and non- foreign areas. See FTR 301-11.27.

§ **As a traveler on official business, am I required to pay**
301-11.28 **applicable lodging taxes?**

Yes, unless exempted by the State or local jurisdiction. However, you will only be reimbursed for the portion of the taxes applicable to the amount of lodging expense for which you are reimbursed. For example, if the maximum lodging rate for your TDY location is \$100 and the tax is 10 percent, but you stay at a lodging facility that charges \$125, assuming you are not authorized actual expense, the amount of lodging reimbursement would be \$100 with an applicable tax amount of \$10, not the \$12.50 you actually paid.

§ **May I be reimbursed for an advance room deposit in**
301-11.32 **situations where a lodging facility requires the payment of a deposit, prior to the beginning of my scheduled official travel?**

Yes, NASA will reimburse you for an advance room deposit when it is required by the lodging facility to secure room reservations prior to the beginning of your scheduled official travel.

Subpart C - Reduced Per Diem

§ **What are examples of when NASA may establish a special**
301-11.201 **reduced rate at a rate below the maximum per diem rate?**

In regard to FTR 301-11.201, some examples of when NASA has established a special reduced rate at a rate below the maximum per diem rate are the following:

A. You are furnished one or more meals a day and/or lodging at no cost or nominal cost by the Government, for example: A NASA directorate may sponsor training at the Wallops Flight Facility in which they provide all your lodging and your evening meal on the first day of travel, three meals a day for the full days of training and breakfast and lunch on the last day of travel. In this instance, if you are informed of these arrangements beforehand and decide to attend the training your reimbursement will be reduced by GSA's predetermined amount for each meal provided.

B. You are performing an extended temporary duty assignment under the following criterion:

(6) Extended TDY Assignments. Authorized assignments of a duration greater than 30 days. For assignment of more than 180

days, NASA requires an analysis of allowances with the assignment as an extended TDY, temporary change of station or permanent change of station by the Deputy Chief Financial Officer (Finance) or his/her designee.

Note: Per IRS Publication 463, Long Term assignments in excess of one year at the same location, regardless of the duties being performed, are considered to be income by the IRS and NASA, as an employer, is obligated to report all reimbursements as income to the employee, from the point that it can be reasonably determined that the assignment will exceed 365 days. A series of assignments to the same location, all for short periods, but that together cover a long period may be considered an indefinite assignment and therefore taxable.

§
301-11.202 **What must be done prior to authorization of an extended TDY assignment?**

The following must be done:

A. The authorizing official must determine whether the assignment is in the best interest of the Government.

B. The DCFO office (or other office as determined by your Center) shall develop a cost comparison to determine whether the assignment should be authorized as an Extended TDY or Temporary Change of Station/Permanent Change of Station assignment. The cost comparison should be attached to the travel authorization to be used to certify fund availability and process travel voucher claims.

§
301-11.203 **What will NASA authorize for TDY and extended TDY assignments?**

NASA will authorize the following:

A. TDY Assignments - Duration of 30 days or less: The traveler will be reimbursed in accordance with the lodging plus system up to the maximum per diem established by GSA for the location of the assignment or any reduced per diem rate determined in advance of the assignment by NASA. Traveler must submit lodging receipts with each claim.

B. Short Term Extended TDY Assignments Duration of 120 Days or Less: For TDY assignments of more than 30 days and not more than 120 days, the traveler will be reimbursed 65 percent of the maximum per diem rate established by GSA for that location, rounded up to the nearest dollar.

C. Long Term Extended TDY Assignments Duration of More Than 120 Days: For long term extended TDY assignments of more than 120 days, the traveler will be reimbursed 65 percent of

the maximum per diem rate established by GSA for that location, rounded up to the nearest dollar.

§ **How is my reimbursement rate affected when a TDY**
301-11.204 **assignment of 30 days or less is extended beyond 30 days?**

There will be occasions where legitimate unforeseen circumstances require the initial TDY assignment to be extended. If the extension is for less than 30 additional days, the traveler may continue to be reimbursed under the lodging plus system. Extensions must be authorized by the cognizant authorizing official. However, if the extension exceeds 30 days or an additional extension is requested, the traveler must be reimbursed at the rate prescribed for the extended TDY assignment. The reimbursement rate change will be effective on the date the authorizing official makes the determination that an extension is required. The per diem rate will be determined based on the length of the extension. Extensions must not be authorized for the purpose of simply maintaining a higher per diem rate in view of the GSA requirement to establish a reduced per diem rate in extended TDY situations.

§ **When does the reduced rate of reimbursement begin?**
301-11.205

The reduced rate of reimbursement will begin on 12:01 a.m. on the day after arrival at the extended TDY location.

§ **How is my reimbursement rate affected when it is determined**
301-11.206 **that a short term extended TDY travel assignment will last more than 120 days?**

If during an extended TDY assignment NASA management decides that the duration of the assignment will exceed 180 days, an analysis of allowances with the assignment will be performed to determine whether it is more advantageous to the Agency to continue as an extended TDY, temporary change of station or permanent change of station.

§ **How are my per diem allowances computed for travel to and**
301-11.207 **from the extended TDY location?**

Employees performing extended TDY assignments will be authorized per diem allowances for travel between the permanent official duty station and the extended TDY station as follows:

A. Day Travel Begins.

(1) Lodging Required. When lodging is required on the day travel begins, (day of departure from the official station or other authorized point) the per diem allowable is the actual cost of lodging incurred by the employee, limited to the applicable maximum lodging allowance prescribed for the location of the

lodgings, plus three-fourths of the applicable M&IE rate. (2) Lodging Not Required. When lodging is not required on the day travel begins, the per diem allowable is three-fourths of the destination M&IE rate, provided you are in a travel status for more than 12 hours.

B. Full Calendar Days of Enroute Travel.

(1) Lodging Required. For each full calendar day the employee is in a travel status and lodging is required (whether enroute or at a temporary duty location other than an extended TDY station) the per diem allowable is the actual cost of lodging incurred by the traveler, limited to the applicable maximum lodging allowance prescribed for the location of the lodging, plus the applicable M&IE rate.

(2) Lodging Not Required. For each full calendar day that the traveler is in a travel status and lodging is not required, (such as when the traveler is enroute overnight to the next TDY location) the per diem allowance is the destination M&IE rate.

(3) Day of Arrival at the Extended TDY Station. For the day of arrival at the extended TDY station, the per diem allowance will be the same as a full calendar day of enroute travel.

Remember the reduced rate of reimbursement will begin on 12:01 a.m. on the day after arrival at the extended TDY location.

C. Returning From Travel.

(1) Lodging Required. For each full calendar day of travel when lodging is required at an enroute location while the employee is returning to the official station, home, or other authorized point, the per diem allowable is the actual cost of lodging incurred by the traveler, limited to the applicable maximum lodging allowance prescribed for the location of the lodging, plus the applicable M&IE rate.

(2) Lodging Not Required. For any full calendar day of travel when lodging is not required while the traveler is enroute overnight returning to the official station, home, or other authorized point, the per diem allowable is the M&IE rate applicable to the preceding calendar day.

(3) Day Travel Ends. For the day travel ends (day traveler returns to the official station, home, or other authorized point) the per diem allowable is three-fourths of the M&IE rate applicable to the preceding calendar day, provided you are in a travel status for more than 12 hours.

§ **What are my transportation allowances for enroute travel to,**
301-11.208 **from, and at the extended TDY station?**

A. Transportation allowances authorized for extended TDY shall be authorized in accordance with Part 301-10-Transportation Expenses.

B. The authorized modes of transportation in order of preference for travel between the permanent duty station and the extended TDY station are:

- (1) Common Carrier;
- (2) Privately-owned vehicle (POV); and
- (3) Rental Car (last resort).

Prior to authorization of enroute transportation allowances, a determination shall be made by the authorizing official to ascertain what local transportation is available at the particular extended TDY station.

§ **When should a POV be authorized as advantageous to the**
301-11.209 **Government or personal preference on an extended TDY assignment?**

A. If common carrier transportation is available to the extended TDY point and local transportation is available at the extended TDY point, the traveler may be authorized a POV allowance on a personal preference basis.

B. If common carrier transportation is available to the extended TDY station but local transportation is not available, a cost comparison is required to determine if the use of a POV for enroute and local travel should be authorized as advantageous to the Government.

C. If common carrier transportation is not available to the extended TDY station and local transportation is not available at the extended TDY location, the use of a POV for enroute and local travel may be authorized as advantageous to the government.

§ **If I am authorized the use of a PO V for an extended TDY**
301-11.210 **assignment, may I be reimbursed for round-trip travel from the place of lodging to the TDY location?**

Only if you are authorized a POV as advantageous to the government. Each authorization is to be supported by a cost comparison indicating that the approval of such expenses is warranted. If you are authorized a POV based on personal preference, you may be reimbursed round trip travel from the place of lodging to the TDY location.

§
301-11.211 **May an employee who has been authorized use of a POV on a personal preference basis or as advantageous to the Government for travel to or at the extended TDY station be authorized use of a rental car?**

An employee who has been authorized use of a POV on a personal preference basis or as advantageous to the Government for travel to or at the extended TDY station can be authorized use of a rental car if a rental car can be justified to be advantageous to the Government and not merely a personal convenience. This applies to both the extended TDY site and when the employee returns to the permanent duty station on official business. An employee should never be authorized a rental car at the TDY site because the family accompanied the employee and needs use of the POV. In these circumstances the employee should obtain a rental car at his or her expense for family use. An example of when it would be advantageous to the Government to authorize an employee a rental car at the permanent duty station would be when the employee returned to the permanent duty station (PDS) on official business by common carrier leaving the POV at the extended TDY site and would have no other means of traveling locally at the PDS than by taxi, which is shown to be more expensive than the daily cost of a rental car.

§
301-11.212 **How will I be reimbursed for subsistence expenses at the extended TDY station?**

Your reimbursement will be based on the applicable authorized reduced per diem rate. Travelers are required to submit receipts for lodging, furniture rental, utilities, and any other expenses over \$75 with each claim.

§
301-11.213 **What allowances are covered by the reduced per diem rate?**

NASA will authorize the traveler a per diem rate that provides:

- A. An efficiency or one bedroom furnished apartment;
- B. Or if not available, an unfurnished efficiency or one bedroom apartment plus the rental of appropriate and necessary furniture; and The following expenses are also included in the lodging and for computing a daily lodging rate when purchased on a weekly or monthly basis:
 - (1) The cost of connection, use and disconnection of utilities,
 - (2) Monthly telephone use fee (does not include installation and long distance calls),
 - (3) Basic cable TV service,
 - (4) Cost of reasonable maid service and cleaning charges.

(5) Miscellaneous deposits/fees such as amenity fee, lodging deposit, move-in fee, application fee, garage fee, storage fee, etc. (GSBCA 16478-TRAV, FTR 301-11.14, 301-11.15)

C. The cost of prepared meals: breakfast, lunch, and dinner.

Note: There is no authority for NASA to pay per diem expenses for any family members who are not NASA employees at the extended TDY site. An employee who decides to take family members along on the extended TDY assignment should be prepared to pay for all their related expenses.

§
301-11.214 **What does NASA authorize when two spouses are performing an extended TDY assignment during the same timeframe at the same location?**

In instances when two spouses are officially authorized to perform an extended TDY assignment during the same time frame at the same location, the following will be authorized:

A. One spouse will be authorized 65 percent of the maximum per diem rate established for the TDY location.

B. The accompanying spouse will be authorized 65 percent of the Meals and Incidental Expense Allowance (M&IE) only, established for the location rounded up to the nearest dollar.

C. M&IE allowance should cover any additional lodging expenses, such as utilities, incurred by the spouse while occupying the same lodging facility.

D. This additional M&IE allowance will not be authorized for assignments of convenience to the employee. The decision as to whether the assignment is one with no additional M&IE allowance or an assignment which includes the additional M&IE allowance will be determined on a case-by-case basis by the staffing needs of the NASA Centers and the employment qualification of the employees involved.

§
301-11.215 **What will I be reimbursed when I am authorized to travel between the extended TDY location and my permanent duty station?**

Travelers are not authorized per diem for official travel at the permanent duty station (PDS) during the extended TDY work or training assignment. However, when official travel is performed at the PDS, the traveler will receive 65% of the lodging rate at the extended TDY site.

§ **What are the average daily fixed costs?**

301-11.216

Fixed costs are those expenses other than meals authorized in the extended TDY per diem rate. The following items are the kinds of items that are included in the fixed costs:

- A. The costs of a suitable efficiency or one bedroom furnished apartment, or if not available,
- B. An unfurnished efficiency or one bedroom apartment, plus an allowance to rent suitable furniture,
- C. The average daily cost of utilities, telephone use fee, and basic cable TV service.

These costs are included in your 65% reduced lodging rate for the extended TDY location.

§ **What will I be reimbursed when I am on military leave while on an extended TDY assignment?**

301-11.217

NASA employees on military leave will be reimbursed for 65% allowable lodging rate while on extended TDY provided the employee acted reasonably and prudently in incurring allowable expenses.

§ **What will I be reimbursed when I am authorized to travel between the extended TDY location and other TDY destination?**

301-11.218

When NASA travelers perform TDY travel at locations other than the permanent duty station during the extended TDY assignment, the employee will be reimbursed the 65% lodging rate at the extended TDY location plus the expenses related to the TDY travel. If the standard authorized M&IE allowance is authorized for the TDY travel, the employee will not be required to itemize the cost of meals. If Actual Expense travel is authorized, the employee must file the travel claim as outlined in Subpart D of this Chapter.

§ **How are my per diem allowances computed when I am authorized to travel between the extended TDY location and other TDY destinations?**

301-11.219

A. Day TDY Travel Begins.

(1) Lodging required. When lodging is required at the TDY site on the day travel begins (day of departure from extended TDY site), the per diem allowable will be the actual cost of lodging incurred by the employee, limited to the applicable maximum lodging allowance prescribed for the location of the assignment plus three-fourths of the destination M&IE rate. In addition, the employee will be reimbursed for the 65% reduced lodging rate at

the extended TDY location.

(2) Lodging costs not incurred. When lodging is not required on the date travel begins, such as staying with friends or relatives or in Government provided quarters, the per diem allowable will be three-fourths of the destination M&IE rate. In addition, the employee will be reimbursed for the 65% reduced lodging rate at the extended TDY location.

(3) Lodging not required due to travel status of 12 hours or less. If the employee is NOT in a travel status for more than 12 hours, the employee is reimbursed the daily reduced per diem rate as usual.

B. Full Calendar Days of Travel at a TDY Location.

(1) Lodging required. For each full calendar day the employee is in travel status and lodging is required, the per diem allowable will be the actual cost of lodging incurred by the traveler, limited to the applicable maximum lodging allowance prescribed for the location of the assignment, plus the location's applicable M&IE rate. In addition, the employee will be reimbursed for the 65% reduced lodging rate at the extended TDY location.

(2) Lodging not required. For each full calendar day that the traveler is in a travel status and lodging costs are not incurred, the per diem allowance will be the destination M&IE rate. In addition, the employee will be reimbursed for 65% reduced lodging rate at the extended TDY location.

C. Day TDY Travel Ends.

For the day the TDY travel ends (day traveler returns to the extended TDY location) the per diem allowable will be three-fourths of the M&IE rate applicable to the preceding calendar day. There should be no lodging costs incurred at the TDY location. In addition, the employee will be reimbursed for the 65% reduced lodging rate at the extended TDY location.

§
301-11.220 **May I stay with friends or relatives at my extended TDY location and receive a portion of the logging allowance at the reduced per diem rate?**

You may only be reimbursed for any additional costs which can be shown to be directly related to your staying with friends or relatives, such as the cost to rent bedroom furniture. Token amounts for increased utility costs cannot be shown to be directly related to your occupancy because of the number of variables involved such as the daily weather conditions. Since you have not incurred any lodging expenses by staying with friends or relatives, NASA has no obligation to reimburse you any amount; therefore there has been no savings to the Government. You have decided to

stay with friends and relatives for your personal convenience and so you will only be reimbursed the reduced M&IE rate and any additional costs incurred directly related to your stay. Since these are considered lodging costs, receipts are required, regardless of the amount.

§ **May I be authorized to return to my permanent duty station**
301-11.221 **for personal reasons while on an extended TDY assignment?**

Yes, periodic return travel home is justified incident to an extended TDY assignment. NASA allows for a trip home an average of every 3 weeks away on an extended TDY assignment, not to exceed 17 trips per a one-year assignment or the prorated equivalent rounded down for assignments of a lesser duration. For example, a six month assignment should not exceed 8 trips. For these authorized trips home you may use the Government contract city-pair fares and travel during work hours without taking any form of leave. You may always return home voluntarily more often than every 3 weeks. However, you may NOT use the Government contract city-pair fares for these trips and you may NOT use your Government contractor provided charge card to pay for the expenses. You must also travel on your own time or take appropriate leave for missed duty hours.

§ **Under what circumstances may my authorized per diem rate**
301-11.222 **is adjusted?**

If the Center DCFO or NSSC official determines that authorizations have been manipulated for the purpose of providing the employee with a higher per diem rate, the following adjustment will be made based on the length of the assignment:

If the total length of assignment is over 30 days and subsequent weekly, biweekly, or monthly authorizations or combinations of these have been issued solely for the reason of providing a higher per diem rate, the traveler will be reimbursed starting at 12:01 a.m. on the day after arrival at the extended TDY location 65 percent of the maximum per diem established by GSA.

§ **How will the adjustments be recovered?**
301-11.223

All adjustments will be recovered by either:

- A. Reducing future reimbursement claims the traveler submits;
- B. Billing and collecting from the traveler for any differential, if necessary; or
- C. Collecting outstanding amounts due the government from the traveler via salary offset procedures.

§
301-11.224 **May I be reimbursed for actual expenses while on an extended TDY assignment?**

Yes. In instances when the prescribed per diem rate for an extended TDY assignment will not cover the continuing cost of the assignment, a request for adjustment should be made to the Director of Business Integration, OCFO, NASA Headquarters. All requests must be submitted in writing and signed by the designated authorizing official (supervisor/ director/ chief).

The request must include:

- A. A statement that the additional cost is a necessary expense to the Government.
- B. A statement that approval of the request is in the best interest of the Government.
- C. Estimated additional cost.
- D. Fund Center and Fund that will finance the additional cost.
- E. Start and end date of additional entitlement.
- F. Thorough explanation of why actual expenses are required.

When this information is collected, prepare a memorandum for the signature of the Director of Business Integration that identifies the traveler, briefly describes the requested exemption/ waiver/ approval, and states that the request is approved.

The request should route through the Agency Travel Business Process Lead and the Director of Business Integration for their concurrence.

§
301-11.225 **May I be reimbursed for the shipment of unaccompanied baggage in connection with my extended TDY assignment?**

Yes, if:

- A. It is justified in connection with your extended TDY assignment.
- B. The unaccompanied baggage being transported is 350 pounds or less.
- C. The assignment is greater than 30 days.
- D. The baggage will be transported in a manner that is most cost-effective to the Agency.

(1) When Driving:

- a. Travelers may ship (UPS/Federal Express, etc.) ground service up to 350 lbs. in addition to what they can carry in their POV, if

authorized.

b. Travelers may rent a trailer/truck (U-Haul, etc.) to carry any additional items to the extended TDY location. However, a cost comparison is required from the traveler showing that renting a trailer/truck is more advantageous to the government than the cost of airfare plus excess baggage or POV plus shipment of 350 lbs.

(2) When Flying:

a. Excess baggage is allowed up to 350 lbs, justification is required.

§ **What will I be reimbursed when I am authorized annual leave**
301-11.226 **while on an extended TDY assignment?**

NASA employees on leave will be reimbursed at a rate that will cover the daily fixed lodging cost incurred at the extended TDY location, not to exceed the maximum lodging per diem at that location.

Subpart D - Actual Expense

§ **Who in my Agency can authorize/ approve my request for**
301-11.301 **actual expense?**

Officials in charge at Headquarters and Center Directors or their designee to whom they have delegated authority.

§ **When should I request authorization for reimbursement under**
301-11.302 **actual expense?**

Request for authorization for reimbursement under actual expense should be made in advance of travel. However, after the fact approvals may be granted when supported by an acceptable explanation.

A. Documentation of Travel Authorization (TA):

When actual expenses in lieu of per diem allowance are to be authorized, the TA will specify:

(1) The maximum expenses to be allowed. The specific places, dates and maximum allowance applicable to each area, and when applicable what will be allowed when traveling on an actual subsistence expense basis is performed in conjunction with travel on a per diem basis.

(2) Per Diem allowance and actual expense allowances will not be authorized for the same period of time.

B. Documentation of Actual Expenses on the Voucher:

(1) Itemization. When travel expense is authorized or approved on an actual expense basis, the employee shall itemize each expense claimed on the travel voucher.

a. Meals must be itemized separately, i.e., breakfast, lunch, and dinner.

b. Those expenses that do not usually accrue on a daily basis, such as laundry and cleaning and pressing of clothing, may be averaged over the number of days that actual expense reimbursement is authorized or Approved.

i. Receipts. Receipts shall be required for lodging, regardless of amount, and any individual meal when the cost is over \$75.00. The authorizing official or DCFO have the discretionary authority to require receipts for other allowable subsistence expenses; however, the employee must be informed of this requirement in advance of travel.

ii. Exception to receipt and/or itemization requirement. When reimbursement for meals and incidental expenses is restricted to 100 percent of the applicable maximum M&IE rate for the locality involved, receipts or itemization of meals and incidental expenses as provided in subparagraphs (1) and (2) above need not be required except at management discretion.

§ **What if my expenses are less than the authorized amount?**

301-11.304

When authorized actual expense and your expenses are less than the locality per diem rate or the authorized amount, reimbursement is limited to the expenses incurred. If you are authorized actual expenses, you may not be authorized the locality per diem rate after the start of the assignment.

§ **What expenses am I required to itemize under actual expense?**

301-11.306

See FTR 301-11.306. When NASA limits M&IE reimbursement to either the prescribed maximum M&IE rate for the locality concerned or a reduced M&IE rate, it may or may not require M&IE itemization at its discretion.

Subpart E - Income Tax Reimbursement Allowance (ITRA), Tax Years 1993 and 1994

§ **What documentation must I submit to substantiate my claim?**

301-11.523

NASA requires the following documentation:

A. A certified statement as prescribed in 302-17.10 of the FTR, and if applicable, the net earnings (or loss) for self-employment income shown on schedule SE of the IRS Form 1040.

B. A copy of W-2's, and if applicable, corrected W-2's.

Any documentation from the IRS identifying any interest or penalty payments (tax years 1993 and 1994 only).

Subpart F - Income Tax Reimbursement Allowance (ITRA), Tax Years 1995 and Thereafter

§ **What documentation must I submit to substantiate my claim?**

301-11.623

NASA requires the following:

A. A certified statement as prescribed in 302-17.10 of the FTR, and if applicable, the net earnings (or loss) for self-employment income shown on schedule SE of the IRS Form 1040.

B. A copy of W-2's, and if applicable, corrected W-2's.

C. Any documentation from the IRS identifying any interest or penalty payments (tax years 1993 and 1994 only).

Part 301-12 - Miscellaneous Expenses Foreign Currency Fee:

§ **What miscellaneous expenses are reimbursable?**

301-12.1

NASA will reimburse as a miscellaneous expenses all items listed in FTR §301-12.1 or any fees absolutely necessary for the completion of travel when they have been authorized and/or approved by the Agency.

§ 301-12.2 **Will NASA pay me for any excess baggage charges I may incur?**

Yes, NASA will pay all charges listed in FTR 301-12.2; however, justification for the excess baggage is required by NASA.

§ 301-12.3 **Will NASA pay for me to make official long distance telephone calls (e.g., to the office), to conduct business while on regular TDY?**

Yes, you are authorized to make and be reimbursed for long distance calls to conduct official business while on regular TDY. You should however; use Government-provided long distance services when they are available or the Government telephone card. NASA saves money when one of these methods is used. See NPD 2540.1.

§ 301-12.4 **Will NASA pay for me to make long distance calls home while on regular TDY?**

Yes, with the following limitations:

For domestic calls:

A. You must be in official travel status for more than 1 night.

B. Calls shall not exceed an average of one per calendar day and shall be brief in duration.

C. You will be reimbursed a maximum of \$5.00 per day.

For international Calls:

D. You must be in official travel status for more than 1 night.

E. Calls shall not exceed an average of one per calendar day and shall be brief in duration.

F. You will be reimbursed a maximum of \$7.00 per day. There will be no reimbursement when a government telephone card is used.

§ 301-12.5 **May I use a Government telephone charge card to make personal long distance phone calls while on regular TDY?**

Yes. NASA employees are encouraged to use the Government telephone card to help save NASA money. See NPD 2540.1.

§ 301-12.6 **How shall I receive reimbursement for telephone expenses?**

If the call is not placed with a NASA calling card, authorized telephone expenses should be claimed on the travel voucher as a miscellaneous expense.

§ 301-12.7 **Do these telephone allowances apply to extended TDY and Permanent Change of Station travel?**

No.

Part 301-30 - Emergency Travel

§ 301-3 **When an illness or injury occurs on TDY, what expenses may be allowed?**

0.4

See FTR 301-30.4. An "alternate location" is a destination other than the employee's official station or the point of interruption where necessary medical services or a personal emergency situation exists. In the case of illness or injury of the employee, the nearest hospital or medical facility capable of treating the illness or injury is NOT considered to be an alternate location.

Part 301 -32 - Invitational Travel

§ 301-32.1 **When may NASA authorize invitational travel for non-NASA persons?**

Invitational travel may be authorized under the following circumstances:

A. It is in the interest of a Center to invite a college or university official or a representative of industry to visit an activity to observe the work performed or the operations of the activity;

B. An individual is requested to lecture, instruct, or give a demonstration at an activity in connection with a NASA operation or program;

C. It is determined that attendance and participation of an individual at a conference or meeting will be in the best interest of NASA;

D. An individual is required to attend a major award ceremony of the Agency or major award ceremony (e.g., a Presidential award ceremony, an annual award ceremony of the Agency or major organizational component, or a prestigious honorary award ceremony sponsored by a non-Federal organization) to accept an award; One individual of the award recipient's choosing, related by blood or affinity, whose close association with the employee is the equivalent of a family relationship, may accompany the award recipient. The following restrictions apply:

(1) Travel must be directly to and from the site of the ceremony.

(2) Travel reimbursement is intended to cover instances in which the award recipient and his or her guest are both geographically distant from the site of the ceremony, rather than instances in which the award recipient's residence is in the same area as the ceremony.

E. A handicapped individual on temporary duty needs an attendant to accompany them on official travel;

F. Attendance of an individual is needed for the purpose of serving as a sponsor or participant in an official ceremony, which is directly related to NASA interests;

G. The NASA Administrator or Deputy Administrator determines that it is in the national interest because of a benefit to NASA's international cooperation efforts or another statutory mission of the Agency for a very high-level or otherwise notable NASA official or employee to be accompanied by their spouse:

(1) To attend an unquestionably official function in which the spouse participates, usually by providing a specific service, in an official capacity, or, because of a significant diplomatic or public relations benefit to the U.S. in a non-participatory role.

(2) Circumstances in which spousal travel will be justified under this Sub-section are rare, and will ordinarily only be present when spouses of other high-level invitees will be in attendance. Approval of invitational travel under this subpart shall be made by the Administrator or Deputy Administrator following review by the Office of General Counsel at NASA Headquarters. When the traveler is the spouse of the Administrator or the Deputy Administrator, approval shall be by the General Counsel.

Part 301-33 - Witnesses or Jurors

§ 301-33.1 When will NASA pay for the travel expenses of witnesses or jurors?

A. If the employee is a witness on behalf of the Government, NASA will issue travel authorizations as follows:

(1) If a case involves business of the Center at which the witness is employed, travel funds of that Center will be cited in the travel authorization.

(2) If the case involves business of a Center different from that at which the witness is employed, the travel authorization will be issued by the Center requesting the appearance of the witness.

(3) If the case involves business of a department or Agency of the Federal Government outside of NASA, that department or Agency concerned will be requested to issue the travel authorization.

B. If the employee is a witness other than on behalf of the Government, NASA will not issue travel authorizations. NASA regulations regarding absence from duty and expense reimbursement from a litigant apply.

C. If the employee is a Juror, NASA will not issue travel authorizations. NASA regulations regarding absence from duty and entitlement or non-entitlement to compensation or expense reimbursement will apply.

§ 301-33.2 Are consultants and experts reimbursed for travel expenses?

Consultants and experts who are in an employment status with or without compensation are reimbursed travel expenses from the time they depart their residence or normal place of business, on official Government business, until they return. The allowable rates and expenses are the same as for NASA travelers.

§ 301-33.3 Are there any limitations that apply to consultants or experts?

When more than 130 days of full-time service is performed in any continuous 376 day period, such employment is no longer considered intermittent and the consultant or expert is automatically converted to the status of temporary employee and is assigned a permanent duty station. When this occurs the consultant or expert is only reimbursed for travel expenses at places other than the permanent duty station.

§ 301-33.4 How will Congressional travel be authorized?

301-33.4

All travel arrangements and inquires for members of Congress and their staffs will be coordinated and handled by the Office of Legislative Affairs, and authorized in accordance with NPD 9710.1_, Delegation of Authority - To Authorize or Approve Temporary Duty Travel on Official Business and Related Matters.

§ 301-33.5 Will employees serving as organization representatives be reimbursed for travel expenses?

Yes, when employees serving as organization representatives perform travel to attend labor management meetings that are certified to be of primary interest to the U.S.

Part 301-34 - Travel on Cost-Sharing Arrangements**§ 301-34.1 When may NASA authorize cost-sharing arrangements for NASA employees?**

301-34.1

An employee and authorizing official may agree to a cost-sharing arrangement for travel under the Government Employees Training Act (5 U.S.C. § 4109). Under these conditions, the travel authorization will include appropriate statements indicating that attendance is in keeping with 5 U.S.C. § 4109, and the travel is a cost-sharing agreement. The cost sharing may be a variety of arrangements such as the employee paying for all travel and per diem expenses while NASA agrees to carry the employee in a duty status, or NASA may agree to pay all or some portion of the expense. The comment section of the travel authorization will contain the following statement:

"Permissive travel authorized under the training act, reimbursement on a cost-sharing basis has been agreed to as mutually advantageous to both parties."

Subchapter C - Arranging for Travel Services, Paying Travel Expenses, and Claiming Reimbursement**Part 301 -50 - Arranging for Travel Services****§ 301-50.2 How should I arrange my travel?**

301-50.2

You must use the services of the TMC servicing your Center to arrange for common carrier transportation, lodging, and rental cars. Absent an approved exception under FTR 301-50.4 or FTR 301-73.104, you are responsible for any additional costs incurred as a result of failing to use the TMC. Furthermore, you may be subject to appropriate disciplinary action. See FTR 301-50.5.

Part 301-51 - Paying Travel Expenses Subpart A - General

§ **What is the required method of payment for official travel**
301-51.1 **expenses?**

See FTR 301-51.1. All NASA Centers must use a central Government contractor-issued travel charge card for the purchase of airline tickets, rail and transaction fees once they have gone to the e-Travel solution.

§301-51.204 **How will I receive my travel advance?**

NASA travelers can only receive travel advances through the Government-issued travel card ATM advances. Exceptions are limited to the following:

A. Travelers without a Government-issued travel card.

B. Foreign travelers going to locations in which access to Automatic Teller Machines (ATM's) is limited.

For the exceptions listed above; travelers will coordinate with the Center's Travel Business Process Lead in the Office of the Chief Financial Officer.

Part 301-52 Claiming Reimbursement

§ **What information must I provide in my travel claim?**
301-52.2

In addition to the information required by FTR 301-52.2, if you travel to a foreign country, you must report total expenditures in U.S. dollars and provide the rate of exchange at which the foreign money was obtained. You may also report exchange fees.

Your travel claim must be recorded on a travel voucher within the Agency-wide electronic travel system. Your electronic signature will be required.

§ **What must I provide with my travel claim?**
301-52.4

In addition to the receipts required by FTR 301-52.4, receipts for lodging taxes must be retained if such taxes are claimed and not included on the receipts for lodging expenses. It is the traveler's responsibility to retain as required by NARA standards.

§ 301-52.6 **How do I submit a travel claim?**

You must:

A. Submit your travel claim to your approving official for signature; and

B. Ensure your travel claim is submitted to the payment office servicing your travel claim in accordance with their operating procedures.

§ 301-52.7 When must I submit my travel claim?

You must submit your travel claim as follows:

A. Within 5 working days after you complete your trip or period of travel;

B. On a monthly basis if you are on extended temporary duty.

§ 301-52.11 What must I do to challenge a disallowed claim?

See FTR 301-52.10. If, after reconsideration by your payment office, your claim is still denied, you may request that the payment office submit your claim to NASA Headquarters, OCFO, for consideration.

§ 301-52.16 What must I do with any unused tickets, coupons, or other evidence of refund?

See § 301-10.114.

§ 301-52.17 Within how many calendar days after I submit a proper travel claim must my Agency reimburse my allowable expenses?

See FTR 301-52.17. NASA's goal is to process all travel claim reimbursements within five days of submission to the payment office.

§ 301-52.20 How are late payment fees calculated?

Late payment fees are calculated by applying the current Prompt Payment Act Interest Rate beginning on the last day of the month after submission of a proper travel claim and ending on the date payment is made.

Part 301-53 - Using Promotional Materials and Frequent Traveler Programs**§ 301-53.2 What must I do with promotional benefits or materials I receive from a travel service provider?**

The benefits or materials received from a travel service provider in connection with official travel may be retained for personal use.

§ 301-53.5 Under what circumstances may I use frequent traveler benefits to upgrade my transported class of service?

You may use frequent travel benefits earned on official travel to upgrade your transportation class to premium class services. However, NASA will not pay for any upgrades, unless you meet one of the exceptions in the FTR 301-10.123 and 301-10.124.

Collection of Undisputed Delinquent Amounts Owed to the Contractor Issuing the Individually Billed Travel Charge Card.

§301-54.1 Is my agency allowed to collect undisputed delinquent amounts that I owe to a Government travel charge card contractor?

Yes, upon written request from the contractor, NASA may collect, from your disposable pay, any undisputed delin-quent amounts that you owe to a Government travel charge card contractor.

Subchapter D - Agency Responsibilities

Part 301 -71 - Agency Travel Accounting Requirements

Subpart B - Travel Authorization

§ 301-71.103 What information must be included on all travel authorizations?

§
301-71
.103

In addition to the information required by FTR 301-71.103, all NASA travel authorizations shall include a travel authorization number. Foreign Travel Authorizations must contain the following information in the comments section:

- A. Detailed description of the trip without acronyms
- B. Travel destination
- C. Leave proposed, if any, during trip
- D. In-country hotel address and phone number
- E. In-country contact name and phone number
- F. Next-of-kin name, relationship to traveler, address and phone number
- G. Name(s) of additional NASA travelers on concurrent trip
- H. Name, organization code, and phone number of Headquarters Program Office Approving Official
- I. China, Taiwan, and Switzerland require travelers to provide their date of birth on their travel authorization.

§ 301-71.104 Who must sign/approve a travel authorization/voucher?

§
301-71.104

The delegation of authority to authorize or approve temporary duty travel is contained in NPD 9710.1_ and FTR 301-71.107. No traveler can "self-approve" their authorization, unless as described in NPD 9710.1_.

Definition of authorizing official and their duties:

A. Authorizing Official -

(4) Review and approve travel documents, such as Travel Authorizations, Travel Vouchers and Local Expense Reports

(Local Vouchers), submitted by Travelers.

(5) Ensure that the arrangements and cost estimates are reasonable and consistent with mission requirements, and are reasonable for obligation.

(6) Review supporting documentation, such as receipts for travel vouchers.

(7) Ensure required receipts are electronically attached to travel vouchers.

(8) Approves any request for annual leave while on official travel.

§ **Are there any situations when a travel authorization is not**
301-71.109 **needed for travel?**

Yes, when travel is performed within 50 miles of the permanent duty station or place of abode, authorization by an authorizing official may be either written or oral.

§ **What must be done regarding the travel authorization if there**
301-71.110 **is a delay in travel?**

When TDY travel dates differ from approved itinerary as specified on the authorization, an amended travel authorization must be issued. The approved authorization and itinerary dates must match in FedTraveler.com prior to submitting voucher.

§ **Under what circumstances may a travel authorization be**
301-71.111 **amended?**

If the authorization is amended before travel begins, the authorization can be amended as necessary. If the authorization is amended after travel commences, the authorization can be amended only:

A. When an error is apparent on the face of the authorization;

B. When facts and circumstances clearly demonstrate that some provision previously determined and definitely intended was omitted when the authorization was prepared (55 CG 1241);

C. When the provisions in the travel authorization are in conflict with the law, Agency regulation, or management instruction.

D. When TDY travel dates differ from approved itinerary as specified on the authorization, an amended travel authorization must be issued. The approved authorization and itinerary dates must match in FedTraveler.com prior to submitting voucher.

§ **What is the procedure if travel authorizations are cancelled?**

301-71.112

The employee is required to inform the authorizing official within 3 days after notification that the travel has been cancelled or postponed for more than 7 calendar days. Additionally the employee must cancel the authorization within the Agency-wide automated travel system.

§ **Under what circumstances may a post approval be obtained for a voucher?**

301-71.113

- A. When an unexpected expense was incurred that was not pre-planned or pre-authorized.
- B. When the mode of transportation was varied due to unforeseen circumstances.
- C. Actual expenses for meals and lodging have increased beyond the traveler's control. 301-228 All circumstances will require justification for approval.

Subpart D - Accounting for Travel Advances

§ **When must an employee account for a travel advance?**

301-71.305

See FTR 301-71.305. As a basic rule, employees on extended assignments will account for a travel advance beginning with the second monthly voucher that is submitted. It will be liquidated in equal installments through the end of the assignment. When it is determined that a voucher payment will result in a negative reimbursement the advance will be accounted for in equal installments starting with the first voucher.

§ **How do we collect the amount of a travel advance in excess of the amount of travel expenses substantiated by the employee?**

301-71.307

When the outstanding advance exceeds what is owed the employee, the employee must submit a check for the difference to the DCFO collection agent. Remittance by check shall be made payable to NASA.

§ **What should we do if the employee does not pay back a travel advance when the travel claim is filed?**

301-71.308

DCFOs shall officially notify the employee when a travel advance is considered to be delinquent. The notification may be accomplished by telephone, official notice, or bill of collection and should direct the employee to liquidate the delinquent advance in full within 10 calendar days after receipt of the notice.

If the employee does not fully pay within the specified timeframe, the outstanding advance will be collected by offsetting the employee's salary within 45 days after the travel was completed. If

required, recovery will also be made from retirement credit, the traveler's estate, by deduction from any amount due from the United States, or by any other legal method that may be necessary (salary offset or collection from other amounts due shall be considered before retirement credit.)

Part 301 -74 - Conference Planning

NASA Sponsored Conferences

See FTR 301-74.8. Officials in Charge of HQ Offices and Center Directors have authority to establish conference lodging allowances, ensuring no allowance is twenty five percent greater than the applicable locality lodging per diem rate. This authority may be delegated to not more than one immediate subordinate official.

Non-NASA Sponsored Conferences

See FTR 301-74.9. A travel approving official may authorize the reimbursement of lodging expenses incurred up to the conference lodging allowance rate.

§ 301-74.19 **What records must we maintain to document the selection of a conference site?**

The recording requirements of FTR 301-74.19 will be fulfilled by completion and retention of the NASA SPONSORED CONFERENCE - APPROVAL TO CONDUCT form, See A-68.

§ 301-74.25 **Will I be reimbursed for registration fees and other expenses in connection with my attendance at a conference?**

There are legal restrictions on the use of appropriated funds in relation to attendance at meetings and conferences. Questions regarding the allowability of meeting expenses should be directed to the appropriate person in the Center DCFO organization, before they are incurred. Some general guidelines are provided below.

Expenses of training do not include membership fees except to the extent that the fee is a necessary cost directly related to the training or that payment of the fee is a condition precedent to undergoing the training.

NASA Sponsored Meeting or Conferences

A. Registration fees or any other fees charged for NASA sponsored meetings or conferences cannot be considered as an allowable expense.

B. Per Diem or actual expenses cannot be paid at the official duty station; those expenses are considered to be a personal expense of the employee.

Non-NASA Sponsored Meeting or Conferences

A. For meetings sponsored by non-governmental organizations, if a single "registration fee" is charged covering both attendance and meals and no separate charge is made for meals, NASA may pay the full fee. If a separate charge is made for meals, NASA may pay for the meals if there is a showing that:

(9) The meals are incidental to the meeting;

(10) Attendance of the employee at the meal is necessary for full participation in the business of the meeting; and

(11) The employee is not free to take the meals elsewhere without being absent from the essential business of the meeting.

B. When travel is involved in attendance at a meeting, under the provisions of 5 U.S.C. 4109 or 5 U.S.C. 4110, registration fees meeting the legal criteria shall be authorized on the travel authorization. When travel expenses (and registration fee, if appropriate) are authorized under the provisions of 5 U.S.C. 4109 for training, the travel authorization shall be supported by an approved training request.

C. When attendance at meetings or conferences is authorized and does not involve travel because it takes place in the local area, approved registration fees will be reimbursed through submittal of a local voucher that will be supported with an approved training request.

D. When meals are included in the registration fee, a reduction will be made to the meals and incidental expense allowance in accordance with FTR 301-11.18. In claiming reimbursement, employees are required to include a copy of the registration form that indicates if the registration fee includes charges for luncheons, banquets, or alcoholic beverages. The form should also indicate which meals were furnished and the dates they were furnished. Finally, a statement should be written on the in comments section of the travel voucher / local voucher, that indicates meals should be deducted from the per diem rate. The cost of alcoholic beverages is not allowable.

§ **What must we provide for Conference Cost Reporting?**

301-74.27

Per the FY 2008 Consolidated Appropriations Act, P.L. 110-161 (the Act), requires that the National Aeronautics and Space Administration (NASA) provide quarterly reports to NASA's Inspector General and an annual report to Congress with specified information regarding events meeting the criteria of a "conference" under the Act. The requirements of the Act are in addition to requirements imposed by the Federal Travel Regulation (FTR) for

conference planning and reporting. The Act requires NASA Head Quarters Offices and NASA Centers to prepare reports on conference costs based on the records of those NASA offices that sponsor conferences and on the records of travelers who attend conferences sponsored by NASA or others. Requirements and guidelines are provided in FMR Volume 8, External Reporting, Chapter 29, "Conference Cost Reporting."

Subpart B - Travel Expenses

§ 301-75.100 **Must we pay all of the interviewee's pre-employment interview travel expenses?**

NASA Centers may pay all or part of pre-employment travel expenses, in accordance with the provisions of FTR 301-75.100. Allowable expenses are subject to applicable Government limitations.

§ 301-75.103 **What are our responsibilities when we authorize an interviewee to use common carrier transportation to perform pre-employment interview travel?**

In addition to the requirements of FTR 301-75.103, Centers shall inform the interviewee of their liability for value of tickets issued until all ticket coupons have been used for pre-employment interview travel or all unused tickets or coupons have been properly accounted for on a travel voucher.

CHAPTER 302 - RELOCATION ALLOWANCES

Part 302-6 - Allowances for Temporary Quarters Subsistence Expenses Subpart A - General Rules

§ 302-6.6 **Must my agency authorize payment of a TQSE allowance?**

See FTR 302-6.6. NASA's authorizing official will determine if TQSE allowance is necessary and will authorize it on NASA Form 1450, Authorization - Change of Station.

§ 302-6.11 **What methods may my agency use to reimburse me for TQSE?**

NASA will reimburse you for TQSE under the actual expense method unless you choose the "Fixed Amount" reimbursement method. Once you select a TQSE method the selection may not be changed. You must make this binding decision when completing the NASA Form 1449 - Information Covering Persons Transferred of Appointed to First Duty Station, before your authorizations are prepared.

§ 302-6.13 **How soon may I/we begin occupying temporary quarters at Government expense?**

TQSE occupancy must begin within 2 years after the employee reports for duty at the new PDS unless that time is extended.

§ 302-6.14 **How is my TQSE allowance affected if my temporary quarters become my permanent residence quarters?**

The payment office will determine this on case-by-case basis using the information that you provide. The following is a list of the kind of information that will be used when making the determination:

- A. Short term lease;
- B. HHG movement into quarters;
- C. Type of quarters;
- D. Expression of intention;
- E. Attempts to secure a permanent dwelling; and
- F. Length of time employee occupied quarters.

§ 302-6.19 **What will I be reimbursed if I am required to perform temporary duty travel while in temporary quarters?**

You will be reimbursed at a rate that will cover the daily fixed lodging cost incurred at the temporary quarter's location, not to exceed the maximum lodging per diem at the location.

Subpart B - Actual TQSE Method of Reimbursement

§ 302-6.100 **What am I paid under the actual TQSE reimbursement method?**

See FTR 302-6.100. If you are authorized the actual TQSE reimbursement method, the actual number of days reimbursed on either a lodgings plus or fixed amount house hunting trip basis are deducted from the first 30 day period of authorized actual TQSE.

§ 302-6.101 **May my agency reduce my TQSE allowance below the "maximum allowable amount?"**

See FTR 302-6.101. TQSE should be reduced or not allowed if you had adequate opportunity to complete arrangements for permanent residence quarters as the result of an extended temporary duty assignment at the new official station or other circumstances. However, if a TQSE is authorized, NASA has determined that for M&IE purposes, costs up to 45 percent of the daily maximum allowance will be considered reasonable.

§
302-6.104 **How long may I be authorized to claim actual TQSE reimbursement?**

See FTR 302-6.104. You will be limited to a maximum of 60 days of TQSE if you elect to use relocation services contractor and receive payment for the home marketing incentive.

§
302-6.106 **May I interrupt occupancy of temporary quarters?**

See FTR 302-6.106. If you are on annual leave at a location other than at the permanent duty location you may not be reimbursed subsistence expenses during the period of leave.

§
302-6.112 **What must I do to file for an extension of my TQSE allowance?**

Authorization to extend the time for temporary quarters and the numbers of days authorized shall be held to a minimum. Extension of time for temporary quarters may be authorized only in situations during the initial 60-day period of temporary quarters. To obtain authorization you must provide the authorizing official with written justification that clearly describes the circumstances, warranting the extension that is beyond your control. We may authorize an extension up an additional 60 days.

For the purpose of this authorization, the Administrator's designee shall be an official at least one management level higher than the official who authorized the first 60 days of TQSE for the requesting employee.

CHAPTER 303 - PAYMENT OF EXPENSES CONNECTED WITH THE DEATH OF CERTAIN EMPLOYEES Subpart D - Transportation of Immediate Family Members, Baggage, and Household Goods

>§
303-70.302 **When the employee dies at or while in transit to or from his/her official station outside CONUS, must we return the employee's immediate family, baggage and household goods to the residence or alternate destination?**

Under FTR 303-70.302, NASA's Associate Administrator, Office of Headquarters Operations, the Center Director or his/her designated representative are designated representatives to approve the family's election to return to an alternate destination.

§
303-70.306 **What are the allowable costs of transportation of household goods?**

The allowable costs include packing, crating, drayage and transportation of household effects such as furniture and furnishings that are usual and necessary for the maintenance of a household establishment. Groceries, provisions, wines, liquors, animals, or birds are not considered household goods. Expenses

incurred in hiring and transporting lift vans, and in packing, crating, boxing, or packing in lift vans for shipment will be paid. However, no allowance will be made for charges in connection with any shipment of empty lift vans, or for payment of storage charges or import duties on lift vans.

Subpart E - Preparation and Transportation Expenses for Remains of Immediate Family Members

§
303-70.400 **When an immediate family member, residing with the employee, dies while the employee is stationed outside CONUS, must we furnish mortuary services?**

The NASA Associate Administrator, Office of Headquarters Operations for Headquarters, or the Center Director, or his/her designated representative, for a Center, may make the determination in FTR 303- 70.400(b).

§
303-70.401 **When an immediate family member, residing with the employee, dies while the employee is station outside CONUS, must we pay expenses to transport the remains?**

The NASA Associate Administrator, Office of Headquarters Operations for Headquarters, or the Center Director, or his/her designated representative for a Center, may approve the alternate destination under FTR 303-70.401. In that case, the allowance expenses cannot exceed the cost of transportation to the decedent's residence.

CHAPTER 304 - PAYMENT FROM A NON-FEDERAL SOURCE FOR TRAVEL EXPENSES

Part 304-1 Acceptance of Payment from a Non-Federal Source for Travel Expenses

§304-1.9 **What form must we use to report payments received by the Agency from Non-Federal sources?**

NASA's Excel version of the SF-326-Semiannual Report of Payments Accepted From a Non-Federal Source shall be used by Centers to report payments received from non-Federal sources. This report applies to all payments that are more than \$250 per event.

NASA SPONSORED CONFERENCE - APPROVAL TO CONDUCT

- Function Title: =
- Function Purpose: =
- Sponsor: =
- Host: =
- Dates: =
- Attendees: =
- NASA: =

NASA Project and Support Service Contractors: _____
 Other Government: _____
 Other: _____

	Location 1	Location 2	Location 3
Site:			
Travel Costs:			
Conference Services Cost:			
Total Conference Cost:			
Total Salary Cost 1			

Estimate based on \$240/day/person

Site recommendation and supporting rationale:

Submitted by: Signature: _____ Date: _____

Title: _____

Action: _____ Approved _____ Disapproved

Signature: _____ Date: _____

Title: _____

Comments: _____

PRESCRIBED MAXIMUM PER DIEM RATES FOR CONUS

For the Continental United States (CONUS) per diem rates, see applicable FTR Per Diem Bulletins, issued periodically and available on the Internet at <http://www.gsa.gov/perdiem>.

PRESCRIBED MAXIMUM PER DIEM RATES FOR OCONUS

Maximum rates of per diem allowances for travel in foreign areas are established by the Secretary of State and apply to all U.S. Government employees and contractors. Applicable rates are available on the Internet at <http://www.state.gov/m/a/als/prdm>.

ALLOCATION TABLE FOR PREPAID M&IE DEDUCTIONS OUTSIDE CONUS

MI&E rates for localities in foreign areas and for localities in non-foreign areas shall be allocated as shown in Appendix B to Chapter 301 of the Federal Travel Regulations (FTR).