

VOLUME 1
JOINT FEDERAL TRAVEL REGULATIONS
CHANGE 239

Alexandria, VA

1 November 2006

These regulation changes are issued for all persons in the Uniformed Services. New or revised material is indicated by a star and is effective 1 November 2006 unless otherwise indicated.

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This change includes all material written in MAP Items 55-06(E); 58-06(E); 62-06(E); 79-06(E); and 94-06(I). Insert the attached pages and remove the corresponding pages. Remove pages xi; and Chapter 2, Part G. This cover page replaces the Change 238 cover page.

BRIEF OF REVISION

These are the major changes made by Change: 239

Introduction Feedback Reporting. Updates USAF HQ address in the JFTR.

U1450. Adds information in the JFTR about the Registered Traveler Program.

U5203-B; U5345-B. Removes unnecessary wording and realigns paragraphs on Reserve Component members' dependent travel and HHG transportation.

Appendix A1. Deletes disabled or special need employee and attendant travel regulations from the JFTR.

Appendix R1; R2; Table of Contents. Moves all Conference Attendance and Planning regulations to Appendix R; deleting JFTR, Chapter 2, Part G

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VOLUME 1

JOINT FEDERAL TRAVEL REGULATIONS

Following is a list of sheets in force in Joint Federal Travel Regulations, Volume 1, that are effective after the sheets of this Change have been inserted. This list is to be used to verify the accuracy of the Volume. Single sheets or entire monthly changes are available from the PDTATAC website.

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Paragraph: U5310-B2a(1)(a)

- Volume 1
- Chapter 5
- Paragraph 310
- Subparagraphs

References and citations to the JFTR should be in the following format:

- JFTR, par. U5310
- JFTR, par. U5310-A
- JFTR, par. U5310-A1
- JFTR, par. U5310-A1a
- JFTR, par. U5310-A1a(1)(a)
- JFTR, pars. U5310-U5350

Paragraphs and subparagraphs may contain itemizations. Reference to a specific item should be in the following format:

- JFTR, par. U5310-A2
- JFTR, par. U5310-B4a

The most specific unit of reference should be used.

CHANGES

DOD Uniformed Travel Determinations (UTDs) initiate changes to the JFTR. A UTD is effective on its indicated date. A UTD may be effective on the date published in the JFTR, on the date of signature by the PDTATAC Chair, on a date after the last signature mutually agreed upon by the Services, or, if permitted or required by law, some other date. When an effective date is earlier than the date assigned to the published change page, changes reflect the specific effective date.

Per diem Bulletins make changes in the non-foreign OCONUS per diem rates contained in <https://secureapp2.hqda.pentagon.mil/perdiem/perdiemrates.html>. Per diem bulletins are published in the Federal Register.

Published changes are numbered consecutively and ordinarily are issued monthly. They contain the text and rate changes directed in determinations. The determinations memoranda included in a published change are shown on the cover sheet of the published change.

New or revised provisions appearing on a change page are indicated by a * symbol placed next to the new or revised portion.

FEEDBACK REPORTING

Recommendations for changes in the JFTR should contain an explanation of and rationale for the proposed change. When the proposal relates to an actual situation, the details should be included. Submit feedback reports concerning inadequate per diem rates in accordance with par. U4179.

Suggestions that would improve this Volume are encouraged. Route them as follows:

1. Army - Through appropriate command channels to: HQDA (DAPE-PRR-C), 300 Army Pentagon, Washington, DC 20310-0300;
2. Navy - Through appropriate command channels to: Deputy Chief of Naval Operations (M&P); Washington Staff/Chief of Naval Personnel (N130E), 2000 Navy Pentagon, Washington, DC 20350-2000;
3. Marine Corps - Through appropriate command channels to: Headquarters U.S. Marine Corps, Manpower and Reserve Affairs (MPO), 3280 Russell Road, Quantico, VA 22134-5103;

Effective 17 August 2006

- *4. Air Force - Through appropriate command channels to: HQ USAF/A1SF, 1040 Air Force Pentagon, (Room 4E235), Washington, DC 20330-1040;
5. Coast Guard - Directly to: Commandant (CG-1222), U.S. Coast Guard, 2100 2nd Street, SW, Washington, DC 20593-0001;

Effective 10 June 2006

6. NOAA Corps - Directly to: Director, Commissioned Personnel Center, NOAA Corps (Attn: Military Advisory Panel Member), PDTATAC (CPC1), 8403 Colesville Road, Suite 500, Silver Spring, MD 20910-6333;

Effective 10 November 2004

7. U.S. Public Health Service - Directly to: Office of Commissioned Corps Force Management, Office of the Director, 1101 Wootton Parkway, Tower Building, Plaza Level, Rockville, MD 20852; or
8. Office of the Secretary of Defense and other DOD Components - Directly to: Per Diem, Travel and Transportation Allowance Committee, Hoffman Building 1, Room 836, 2461 Eisenhower Avenue, Alexandria, VA 22331-1300.

Effective 22 June 2006**HOW TO GET THE JFTR**

Printed paper JFTR copies and changes can no longer be ordered. You can download and print copies by accessing the following website: <https://secureapp2.hqda.pentagon.mil/perdiem/trvlregs.html>.

- C. Passports and/or Visas (Including Green, Cards, Photographs for OCONUS Travel and Physical Examinations Required to Obtain a Visa) for Emergency Technical Support Personnel
- D. Reimbursement when No Travel Is Involved
- E. Voucher Submission

U1420 REGISTRATION FEES

U1425 REIMBURSEMENT OF PREPARATORY TRAVEL EXPENSES WHEN THE ORDER IS AMENDED, MODIFIED, CANCELED OR REVOKED

U1430 NONREFUNDABLE ROOM DEPOSIT OR PREPAID RENT
 A. When TDY Is Curtailed, Canceled or Interrupted for Official Purposes
 B. Considerations

U1450 REGISTERED TRAVELER PROGRAM

PART D: ISSUANCE OF MEAL TICKETS

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| U1500 | MEAL TICKETS A. Issuance B. Procedures C. Value |

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U1425 REIMBURSEMENT OF PREPARATORY TRAVEL EXPENSES WHEN THE ORDER IS AMENDED, MODIFIED, CANCELED OR REVOKED

Preparatory travel expenses, such as fees for traveler's checks, passports, visas (including green cards) (see par. U1415), and communications service, incurred prior to order change are reimbursable provided the action taken is beyond the member's control, in the Government's interest, and a refund is unobtainable.

U1430 NONREFUNDABLE ROOM DEPOSIT OR PREPAID RENT

A. When TDY Is Curtailed, Canceled or Interrupted for Official Purposes. When a member has made advance lodging arrangements (including deposits for rental units) and the TDY is curtailed, canceled, or interrupted, lodging cost reimbursement may be approved by the AO. See 59 Comp. Gen. 609 (1980), 59 id. 612 (1980), 60 id. 630 (1981), and cases cited therein. *Reimbursement must not exceed the amount of the remaining per diem or AEA plus appropriate lodging taxes that would have been paid had the TDY not been curtailed or interrupted.*

B. Considerations. The AO should consider if the:

1. Member acted reasonably and prudently in incurring lodging expenses;
2. Member had a reasonable expectation of the TDY being completed as authorized;
3. Assignment was changed for official purposes or for other reasons beyond the member's control that are acceptable; and
4. Member took steps to obtain a refund once the TDY was officially canceled, or curtailed.

***U1450 REGISTERED TRAVELER PROGRAM**

1. The Registered Traveler (RT) program was developed by the Transportation Security Administration (TSA) to accelerate the screening process, at participating airports, for travelers who voluntarily enroll in the program.
2. Participation in this program is not required by the Government.
3. Fees for enrollment in this program are not reimbursable.

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***CHAPTER 2**

PART G: RESERVED

U5310

BASIC ALLOWANCES

- A. General
- B. Prescribed Weight Allowances
- C. Professional Books, Papers, and Equipment (PBP&E)
- D. Additional Consumable Goods
- E. Certain Articles Involving a Weight Additive
- F. Excess Costs for Transportation of Boats as HHG
- G. Civilian Clothing of Recruits
- H. Storage
- I. Government-paid Expenses
- J. Authorized Transportation Locations
- K. Transportation of Replacement HHG Items
- L. Required Medical Equipment

U5315

ADMINISTRATIVE WEIGHT LIMITATIONS

- A. General
- B. Authorization
- C. Exceptions

U5317

HHG TRANSPORTATION DISALLOWED

U5318

RE-TRANSPORTATION OF THE SAME HHG

U5320

TRANSPORTATION METHODS

- A. HHG
- B. Unaccompanied Baggage
- C. Government-procured Transportation
- D. Personally-procured Transportation and NTS
- E. Split Shipment

U5330

FACTORS AFFECTING HHG TRANSPORTATION

- A. Combining Weight Allowances when Husband and Wife Are Both Members
- B. Impact of Order Effective Date
- C. Order Amended, Modified, Canceled or Revoked
- D. Improper Transportation
- E. Items of Extraordinary Value

- F. HHG and Mobile Home Allowance
- G. HHG Transportation before an Order Is Issued
- H. Time Limitation
- I. Alcoholic Beverage Shipment

U5335

NET WEIGHT DETERMINATION

- A. General
- B. Government-arranged Move and Transportation at Personal Expense
- C. DPM Transportation
- D. Unaccompanied Baggage
- E. When Shipment Weight is Unobtainable
- F. Exceptions

U5340

EXCESS CHARGES

- A. General
- B. HHG Transportation in Excess of Authorized Weight Allowance
- C. HHG Transportation other than between Authorized Locations
- D. Transportation of Unauthorized Articles
- E. HHG Transportation with Special Routing or Services Provided

U5345

TRANSPORTATION UNDER VARIOUS ORDER TYPES

- A. Entrance into the Service
- B. Called/Ordered to Active Duty
- C. PCS with TDY En Route, PCS while on TDY, or PCS Following TDY Pending Further Assignment
- D. Courses of Instruction of 20 or More Weeks at One Location
- E. CONUS Area to Which HHG Transportation Is Prohibited
- F. Ordered to a CONUS Hospital
- G. Ordered from PDS to Await Orders, Detail, Assignment, or Separation
- H. Ordered on PCS to a PDS in the Vicinity of Storage

CHAPTER 5

*PART C: DEPENDENT TRAVEL AND TRANSPORTATION ALLOWANCES

U5200 PURPOSE

This Part prescribes a dependent's travel and transportation allowances incident to a PCS move and under unusual or emergency circumstances. Chapter 7 includes a dependent's travel and transportation allowances in other special circumstances.

U5203 BASIC AUTHORIZATION

A. General

1. Members are authorized a dependent's PCS travel and transportation allowances (except as indicated in par. U5203-B) for travel between points authorized in this Volume. Unless otherwise specified in this Part, the authorization conditions in Part B apply. Except for travel by mixed modes under par. U5105-E, a dependent's PCS travel and transportation allowances are:
 - a. Transportation-in-kind (see par. U5105-D) plus per diem (see par. U5210); or
 - b. Reimbursement for common carrier transportation procured at personal expense (see par. U5105-C) plus per diem (see par. U5210); or
 - c. MALT (see par. U5105-B) for POC travel, plus per diem (see par. U5210) for the required travel days between authorized points, up to the allowable travel time computed under par. U3005-C.
2. POC use for PCS travel, other than transoceanic, is advantageous to the Government. If a member elects not to move a dependent when authorized, a dependent's travel and transportation allowances for a still-eligible dependent is payable incident to a subsequent PCS up to the greater of the distance to the new PDS from the:
 - a. HOR or PLEAD (unless moved to the HOR or PLEAD ICW a move to 'another location' IAW par. U5218); or
 - b. Designated place; or
 - c. PDS from which the member elected not to move the dependent; or
 - d. Last PDS.

Any interim PCSs, for which a member did not claim a dependent's travel and transportation allowances, are ignored.

*B. When a Dependent's Travel and Transportation Allowances Are Not Payable. Members are not authorized a dependent's travel and transportation allowances:

1. When a member is:
 - a. A cadet or midshipman;

- b. Assigned to a school or installation as a student, if the course of instruction is to be of less than 20 weeks duration (except as noted in par. U2146-B);
 - c. A Reserve Component enlisted member called (or ordered) to IADT for less than 6 months;
 - d. Called or ordered to active duty for training for fewer than 140 days; when the active duty for training period contemplated by an order is for fewer than 140 days (except as noted in par. U2146-B (“TDY” training 140 or more days, but not more than 180 days)), or active duty for training for 140 or more days when the active duty is at more than one location, but less than 140 days (except as noted in par. U2146-B) at any one location; or
 - e. Called to active duty (for other than training) for 180 or fewer days, or active duty for more than 180 days when the active duty is at more than one location, but 180 or fewer days at any one locations; or
 - f. Called to active duty (for other than training) for more than 180 days at one location but authorized per diem IAW par. U7150-A4b(3).
2. When a dependent:
- a. Is a member on active duty on the PCS order effective date (see par. U5215-I for travel and transportation allowances after the spouse is no longer on active duty);
 - b. Travels at personal expense before a PCS order is issued or before official notice is received that such an order is to be issued (see par. U5203-C) (***transportation-in-kind, including Government-procured transportation, must not be furnished before a PCS order is issued***);
 - c. Is not a dependent (except as provided in par. U5215-B) on the effective date of the PCS order (see Appendix A) (authorization for allowances in pars. U5215-I (spouse separates/retires from service after the member’s PCS order effective date) and U5240-G (dependent’s travel and transportation is incident to an IPCOT) is unaffected);
 - d. Receives any other Government-funded travel and transportation allowances for this travel;
 - e. Is a member’s or spouse’s parent, stepparent, or person in loco parentis (except as provided in par. U5215-B) as set forth in Appendix A, definition of Dependent item 9, who does not reside in the member's household, unless otherwise authorized/approved through the Secretarial Process; or
 - f. Is a dependent child who is not under the member’s legal custody and control on the PCS order effective date (B-131142, 3 June 1957) (see par. U5215-J for travel authorization when legal custody and/or control changes after the PCS order effective date);
3. For a dependent’s travel:
- a. Any portion of a journey they are transported by a foreign registered ship or airplane, if U.S. registered ships or U.S. flag air carriers are available for the usually traveled route (however, per diem is payable);

- b. Between points otherwise authorized in this Part to a place at which they do not intend to establish a permanent residence (*including pleasure trips*). For PCS travel of a student (see definition in par. U5243-D1b), the permanent residence of the student not living with the member while at school is the member's PDS, or the designated place of the member's other dependents if they are not authorized to reside with the member);
- c. When transportation is made available (whether used or not) to a member for a dependent by a foreign government, at no cost to the U.S. or the member, under a contract or agreement with the U.S. (however, per diem is payable);
- d. For transoceanic or OCONUS land transportation when the member is 'without dependents' as defined in par. U9000-B3 and U9000-B4 (unless a member is assigned to a COT and is to serve an accompanied tour at the new PDS--see par. U5222-F2, U5222-F4, and U5222-G);
- e. To an OCONUS PDS when a member's unexpired term of service is less than the prescribed OCONUS tour, unless the member voluntarily extends the term of service to permit completion of the prescribed tour or the Secretary concerned grants an exception to the normal OCONUS tour on an individual case basis;
- f. To an OCONUS PDS when the dependent is not command sponsored prior to travel commencement or when the member has less than 12 months remaining on the OCONUS tour after the dependent is scheduled to arrive, unless specifically exempt under pars. U5222-B and U5222-E;
- g. To CONUS when the presence of the dependent at the OCONUS PDS was not authorized/approved by the appropriate OCONUS military commander;
- h. To a TDY station (when a member is assigned to indeterminate TDY, see par. U4605);
- i. When the member is: in an AWOL status; a deserter or straggler; dropped or dismissed; transferred as a prisoner to a place of detention; transferred to a different location to await trial by court-martial; or in confinement, except as provided in par. U5900-D2h; or U5240-F1 or U5240-F2.

C. Travel before an Order Is Issued. A member authorized a dependent's travel and transportation allowances is authorized the allowances in par. U5203-A for a dependent's travel performed during the period before a PCS order is issued and after the member is advised that such an order would be issued. General information furnished to the member concerning order issuance before the determination is made to actually issue the order (such as time of eventual release from active duty, time of service term expiration, retirement eligibility date, and expected rotation date from OCONUS duty) is not advice that the an order is to be issued (52 Comp. Gen. 769 (1973)). Vouchers must be supported by statements by the PCS AO or a designated representative, that the member was advised in accordance with the requirements of this par. U5203-C. Par. U5203-C does not apply to the travel contemplated in pars. U5240, U5900, and U6004.

D. Time Limitation. Unless otherwise prescribed in this Volume, a member's authorization for dependent travel and transportation allowances to a PDS may be used any time while the order remains in effect and prior to receipt of further PCS orders to other PDSs, as long as the dependent's travel is incident to the member's PCS rather than for personal reasons (45 Comp. Gen. 589 (1966); B-183436, 22 July 1975).

Effective 24 February 2004

U5205 TRAVEL AND TRANSPORTATION FOR A DEPENDENT RELOCATING FOR PERSONAL SAFETY

A. General

1. The member's spouse or the parent/court appointed guardian of a dependent child may request relocation for personal safety and may be authorized travel and transportation under par. U5205 if it is determined by the Service-designated official that:
 - a. The member has committed a dependent-abuse offense against a dependent of the member;
 - b. A safety plan and counseling have been provided to the dependent;
 - c. The dependent's safety is at risk; *and*
 - d. Dependent relocation is advisable.
2. Dependent(s) relocation must be in the best interest of the:
 - a. Member or the member's dependent, *and*
 - b. U.S. Government.

B. Definitions

1. Dependent Child. For the purposes of par. U5205, a member's dependent is
 - a. A dependent/acquired dependent as defined in Appendix A; and
 - b. A member's unmarried child who was transported to the member's PDS at Government expense and who, by reason of age or graduation from (or cessation of enrollment in) an institution of higher education, would otherwise cease to be a dependent of the member while the member was serving at that station.
2. Dependent-abuse Offense. A dependent-abuse offense is conduct by a member (as defined in 10 USC §1059(c)) on active duty for more than 30 days that involves abuse of the spouse/dependent child.

C. Restriction. *HHG/POV transportation may be authorized only if a written agreement of the member, or an order of a court of competent jurisdiction, gives possession of the HHG/POV to the member's spouse/dependent.*

D. Authorization

1. When an order directing a member's PCS has not been issued, or when it has been issued but cannot be used as authority for the transportation of the member's dependent, baggage, and HHG; transportation may be authorized for the member's dependent, baggage, and HHG from the PDS to the designated relocation site in the U.S., or its possessions, or if the dependent is a foreign national to the country of the dependent's origin.

2. Transportation-in-kind, transportation reimbursement, or MALT plus a per diem, is authorized for the dependent(s).
3. If the member's PDS is OCONUS, transportation may be authorized for one POV that is owned/leased by the member/dependent and is for the personal use of the member's dependent.
4. Transportation of HHG in non-temporary storage to the designated relocation site may be authorized.

E. Reimbursement. IAW 37 USC §406(h)(4)(A), all monetary payments, except DLA, are paid directly to the dependent(s) instead of the member.

U5207 TRANSOCEANIC TRAVEL

A. Transportation Mode

1. Air travel is the usual transportation mode for the dependent to, from, or between OCONUS areas.
2. Maximum use should be made of Government air transportation.
3. A dependent is not required to use Government air transportation. However, if the dependent agrees to do so, the dependent must not be required to use other than regularly scheduled transport type aircraft (e.g., Patriot Express/Category B AMC transportation) ordinarily used for passenger service.
4. When appropriate Government air transportation is available, travel by aircraft is not medically inadvisable, but a dependent elects to travel at personal expense, reimbursement is in accordance with par. U5116-D1.

B. Air Travel Medically Inadvisable

1. When air travel is medically inadvisable for a family member, the family should not be separated unless the family agrees to be, or unless military necessity requires the member to travel separately.
2. When air travel is medically inadvisable, surface transportation provided must be the least costly first-class commercial ship passenger accommodations. See par. U3130-D concerning required use of U.S. registry ships.
3. The provisions in par. U5116-D1 for directing a member to use Government/Government-procured transportation do not apply when a medical condition prevents a family member's travel by aircraft.

C. Travel by Oceangoing Car Ferries. When travel is by oceangoing car ferry, allowances are in pars. U5116-C and U5210.

U5210 PER DIEM RATES FOR A DEPENDENT'S TRAVEL

A. General. A member is authorized a per diem allowance for each dependent's travel in connection with the member's PCS, or for other travel as hereinafter prescribed in this Part. Travel time for which per diem may be paid is determined under par. U5160 in the same manner as for a member. A member's travel time and the amount of per diem actually paid for the member's travel in connection with the PCS are not used in computing the per diem allowance for travel of any of the dependents addressed in pars. U5210-B and U5210-C.

Effective 19 March 2004

B. Dependent Accompanies Member. When a dependent travels with a member, the member is authorized per diem for each dependent while traveling, and at delay points, in an amount equal to the following percentage of the per diem to which the member is authorized:

1. Three-fourths for each dependent age 12 or older; and
2. One-half for each dependent under age 12.

NOTE: When more than one POC is used as provided for in par. U5015-A, and dependents traveling in the POCs travel along the same general route on the same days as the member, the dependents are accompanying the member. See par. U5210-C for a dependent 'not' accompanying the member. A member's TDY location is not a delay point for a dependent. No per diem is authorized for a dependent for time at a TDY location.

C. Dependent Travels Independently. A dependent is not 'accompanying the member' when the dependent travels separately from a member on different routes or at different times. The member is authorized per diem for this dependent as follows:

1. One Dependent Traveling Separately. The same per diem rate the member would have been authorized for travel.
2. Two or More Dependents Traveling Separately. When two or more dependents travel together separate from a member, the member is authorized per diem for one member-designated dependent, age 12 or older, in an amount equal to the per diem to which the member would have been authorized for personal travel. For each of the other dependents, age 12 or older, traveling with that dependent, the member is authorized per diem in an amount of three-fourths of the per diem to which the member would have been authorized for personal travel. For each dependent under age 12, the per diem is one half of the per diem to which the member would have been authorized.

Effective 1 October 2005

D. Examples

D. Transportation of Unauthorized Articles. Non-HHG articles (see “HHG” definition in Appendix A) must be transported apart from authorized HHG. The member should arrange for separate transportation. When non-HHG articles are disclosed, the member is financially responsible for all identifiable transportation costs for the articles. If the transportation cost of the articles cannot be established, the weight of the non-HHG articles is excess weight and the transportation cost is computed under par. U5340-B.

E. HHG Transportation with Special Routing or Services Provided. When special routing or services have been furnished at the member's request, the member is financially responsible for the transportation cost above the cost of transporting the HHG without the special routing or services. Subject to pars. U5340-A through U5340-D and upon the member's or heirs' (of a deceased member) written request and agreement to pay any additional cost, the member or heirs may:

1. Turn over the HHG to a transportation officer for transportation at different times to the same destination;
2. Have special services used, such as additional valuation, specific routing, special loading, and other special or accessorial services which may involve additional expenses;
3. Have transportation between any points, limited to the cost in par. U5340-C. However, it must not be applied to HHG if the member is not authorized a HOS move;
4. Have HHG transportation of one final HHG shipment of articles legally awarded to a former-spouse incident to a divorce when a member has a transportation authorization under a PCS order, including separation and retirement (61 Comp. Gen. 180 (1981)).

***U5345 TRANSPORTATION UNDER VARIOUS ORDER TYPES**

See par. U5222 for related dependent travel.

A. Entrance into the Service

1. Initial Reporting. A commissioned, reinstated or warrant officer appointed or reappointed in a regular service, and a person enlisted from civil life or a Reserve Component is authorized HHG transportation from the home or PLEAD to the first PDS. See U5345-A2.
2. A Member Who Reenters the Service within 1 Year of Discharge or Release from Active Duty. A member who reenters any Uniformed Service, within 1 year from the date of discharge or separation under honorable conditions, is authorized HHG transportation to the new PDS from any combination of the following places:
 - a. Home or PLEAD;
 - b. The last or any previous PDS;
 - c. An authorized storage place; or
 - d. Any place to which HHG were transported at Government expense.

*B. Called/Ordered to Active Duty

1. Called/Ordered to Active Duty for Training of 140 or More Days at One Duty Station. A Reserve Component member called/ordered to active duty for training of 140 or more days at one duty station under conditions other than those in par. U5345-B2 is authorized HHG transportation from HOR, or the PLEAD, to the first or any subsequent PDS.
2. Called/Ordered to Active Duty for Training for Fewer Than 140 Days at One Duty Station. An AO may authorize the TDY HHG weight allowance from HOR or PLEAD to the first and/or any subsequent duty station for a Reserve Component member called/ordered to active duty under the following conditions:
 - a. Initial active duty for training for less than 180 days,
 - b. Active duty for training for fewer than 140 days, or
 - c. Active duty for training for 140 or more days with fewer than 140 days at any one location, or
 - d. Active duty for training of 140 or more days and the Secretary has prescribed TDY allowances IAW par. U2146-B.

HHG transportation under par. U5345-B is subject to the same limitations and requirements as in par. U4705.

3. Called/Ordered to Active Duty (for other than training) for More than 180 days at One Duty Station. A Reserve Component member called/ordered to active duty for other than training for more than 180 days at one duty station under conditions other than those in par. U5345-B4 is authorized PCS HHG transportation from HOR, or the PLEAD, to the first or any subsequent PDS.
4. Called/Ordered to Active Duty (for other than training) for 180 or Fewer Days at One Duty Station. A Reserve Component member called/ordered to active duty for other than training for a period of 180 or fewer days at one duty station under the following conditions may be authorized HHG transportation within the TDY weight allowance from HOR or the PLEAD, to the first or any subsequent duty station:
 - a. Active duty for other than training for 180 or fewer days,
 - b. Active duty for other than training for more than 180 days with 180 or fewer days at any one location, or
 - c. Active duty for other than training of more than 180 days and the Secretary has prescribed TDY allowances IAW par. U7150-A4b(3).

HHG transportation under par. U5345-B4 is subject to the same limitations and requirements as in par. U4705.

5. Recalled to Active Duty. A member released from active duty, authorized HHG transportation to a HOS as in par. U5365-A and recalled to active duty, is authorized HHG transportation from the:

- a. Selected home, or
- b. PLEAD, if recalled after selecting a home, or
- c. Place to which such HHG were last transported at Government expense (including place of NTS) in any event.

6. Commissioned or Appointed from the Ranks to Officer Status. For each officer commissioned/appointed from the ranks (including a graduate of officer candidate's school), HHG transportation is authorized from the home and/or the last PDS to the new PDS, including the place at which the member is commissioned or appointed if such place is, in fact, the member's first PDS as a commissioned or warrant officer.

7. Commissioned from Service Academies. Members of a graduating class of a Service academy commissioned as officers are authorized HHG transportation from the:

- a. Academy to the officer's home,
- b. Academy to the first PDS, and
- c. Officer's home to the first PDS (See ***NOTE*** below).

NOTE: HHG transported from the academy to the home cannot then be transported from the home to the first PDS using the order under which they were shipped to the home (see par. U5318).

C. PCS with TDY En Route, PCS while on TDY, or PCS Following TDY Pending Further Assignment

Effective 19 January 2006

1. PCS with TDY En Route or while on TDY. A member, ordered to make a PCS with TDY en route, or while on TDY is ordered to make a PCS without return to the old PDS, is authorized HHG transportation to the new PDS. The member may elect HHG transportation of up to the TDY weight allowance to the new PDS via TDY station(s) if such HHG are necessary for the member's personal use. This authorization TDY HHG transportation exists regardless of the provisions of par. U4705. The member also is authorized NTS under par. U5380-L, table item 1, for the TDY. Storage in transit of any portion of the member's TDY HHG at the TDY station may be authorized/approved by the member's commanding officer, the order-issuing official, the destination transportation officer, or any other Service-designated official at the TDY station, if necessary. Upon TDY completion, the member's TDY HHG may be transported (including storage in transit under par. U5375) to locations authorized under the basic order. As an alternative, the HHG may be placed in NTS if such storage is an option under the member's basic order.

2. PCS Following TDY Pending Further Assignment. A member, whose HHG were placed in NTS at Government expense when the member was ordered to a TDY station pending further assignment, is authorized NTS for the full TDY period. When the new PDS is OCONUS or at a station to which HHG transportation is prohibited or restricted, or when for reasons beyond the member's control the HHG cannot be withdrawn during the first 90 days after the arrival date at the OCONUS PDS or the PDS to which HHG transportation is prohibited or restricted, or within 90 days following TDY completion, an additional 90 days of NTS may be authorized/approved as under par. U5375-B2. When the new assignment is to sea duty, OCONUS duty, or duty at a PDS to which HHG transportation is prohibited and the designated place under par. U5222-D is at or in the vicinity of the NTS location, HHG transportation from storage to the residence is authorized under par. U5310-I3.

CHAPTER 10

OVERSEAS HOUSING AND FAMILY SEPARATION HOUSING ALLOWANCES

PART A: DEFINITIONS

U10000 DEFINITION OF TERMS AS USED IN THIS CHAPTER

Effective 1 October until 31 December 2005

A. Member-with-dependents. For OHA purposes, a member who:

Effective 1 November 2005

1. Has dependents residing at or in the vicinity of the member's OCONUS PDS; or
2. Is joined by or who acquires dependents while serving outside the U.S.; or
3. On the effective date of a PCS order had a member spouse who was later released from active duty, or separated/retired from the Service, and remained in the vicinity of the first member's former PDS; or
4. Who does not have legal custody and control of dependent(s) but is paying child support.

NOTE: Per DODI 1315.18, Procedures for Military Personnel Assignments, command sponsorship is not required for OHA at the with-dependents rate.

Effective 1 November 2005

B. Member-without-dependents. For OHA purposes, a member-without-dependents means a member who has no dependents.

NOTE: A member assigned to an unaccompanied tour or unusually arduous sea duty whose dependents remain at the member's old OCONUS PDS or are at an OCONUS designated place is a member without dependents at the member's unaccompanied or unusually arduous PDS for BAH/OHA and FSH purposes if not assigned Government quarters (See Chapter 10, Part D for FSH rules) and the member is eligible for BAH/OHA at the with-dependents rate for the dependents' location.

C. Sharer. This Chapter authorizes OHA for a member who resides with one or more:

1. Members authorized an OHA for that location; and/or
2. Federal civilian employees, including dependents, authorized a living quarters allowance or COLA (in non-foreign OCONUS locations) for that location; and/or
3. Other persons, excluding the member's dependents, who contribute money toward the payment of rent, mortgage and/or utilities.

D. Owner-owned Multiple Occupancy Dwelling. A member/owner-owned duplex, triplex or other type of multiple-occupancy dwelling that is designed for separate private sector housing units for more than one household. The units within the dwellings ordinarily have separate addresses and/or entrances. For the purpose of this Chapter the member and dependents occupy a single separate unit within the dwelling and the other units are rented out.

Effective 16 November 2005

E. Vicinity. When a member resides with a dependent and commutes daily to the PDS the dependent is deemed to be residing in the PDS vicinity regardless of distance even if the dependent is at a place in an adjacent country or state. A dependent is residing in the PDS vicinity if residing in the same country, state (when in Alaska or Hawai'i), or U.S. territory or possession within which the member's PDS is located. However, if the member has to maintain separate households, the dependent is not deemed to be residing in the PDS vicinity for FSH purposes if maintaining two households is authorized/approved through the Secretarial Process. A Commander submits requests for determination through channels to the appropriate office listed below:

1. Army - Through appropriate command channels to: HQDA (DAPE-PRC), 300 Army Pentagon, Washington, DC 20310-0300;
2. Navy - Through appropriate command channels to: Deputy Chief of Naval Operations (M&P); Washington Staff/Chief of Naval Personnel (N130E), 2000 Navy Pentagon, Washington, DC 20350-2000;
3. Marine Corps - Through appropriate command channels to: Headquarters U.S. Marine Corps, Manpower and Reserve Affairs (MPO), 3280 Russell Road, Quantico VA 22134-5103;

Effective 17 August 2006

- *4. Air Force - Through appropriate command channels to: HQ USAF/A1SF, 1040 Air Force Pentagon, (Room 4E235), Washington, DC 20330-1040;
5. Coast Guard - Directly to: Commandant (CG-1222), U.S. Coast Guard, 2100 2nd Street, SW, Washington, DC 20593-0001;
6. NOAA Corps - Directly to: Director, Commissioned Personnel Center, NOAA Corps (Attn: Military Advisory Panel Member), PDTATAC (CPC1), 1315 East-West Highway, Room 12100, Silver Spring, MD 20910-3282;
7. U.S. Public Health Service - Directly to: Office of Commissioned Corps Force Management (Attn: PDTATAC MAP Member), 1101 Wootton Parkway, Plaza Level, Suite 100, Rockville, MD 20852-1061.

F. Government Quarters. In addition to Government Quarters as defined in Appendix A, Government Quarters include individual quarters furnished with or without charge under agreement with the U.S. Government.

CHAPTER 10**PART B: GENERAL INFORMATION****U10100 GENERAL**

Effective 28 October 2005

NOTE:

- 1. OHA is not intended, and must not be allowed to be used, for the personal enrichment of a member by including costs incurred for adapting a residence to accommodate renters.*
- 2. OHA is intended to assist in paying for private sector leased/owned housing for a member and/or a member's dependents.*
- 3. Disciplinary action addressed in par. U1055 applies when housing allowances are used for other than the purpose intended.*

A. **Purpose.** OHA is authorized to assist a member in defraying the housing costs incurred incident to assignment to a PDS outside the U.S. All members authorized to live in private sector leased/owned housing are authorized OHA, provided an Individual Overseas Housing Allowance (OHA) Report (DD Form 2367) is completed by the member and approved by the senior officer of the Uniformed Services in the country concerned, or the individuals or offices designated for that purpose by the senior officer (see Appendix M, Part III for responsibilities of the Overseas Command/Commander, Senior Officer and Country Allowance Coordinator). There are two types of housing allowances paid under the OHA:

1. An up-front, lump-sum MIHA for those who qualify (see par. U10104 and Appendix N for rules and information), and
2. A monthly OHA including a utility/recurring maintenance allowance.

The location MIHA is based on the average "move-in" costs for members. The monthly OHA is the rent, up to the rental allowance at a PDS, plus the utility/recurring maintenance allowance.

B. **Precedence of Other Authorities.** OHA payment is predicated on the same rules for dependency adjudication, Government quarters adequacy, and Government quarters assignment that apply to BAH. Any eligibility issue relating to those criteria must meet the same decision rules as BAH; e.g., if a dependency relationship is valid for BAH, it is also valid for OHA, a quarters assignment issue that fails the BAH eligibility criteria, also fails for OHA. See Chapter 26, DODFMR for DOD Services and Service regulations/directives for non-DOD Services.

C. **Allowances Payable.** The OHA amount payable is determined as shown in Appendix K, unless a special determination jointly issued by the Secretary Concerned and the PDTATAC Chair authorizes a different rate due to special circumstances. OHA rates are based on a member's PDS except as indicated in Part C.

D. **OHA Calculation.** OHA is calculated by comparing the member's monthly rent to the prescribed locality rental allowance, selecting the lesser of the two, and then adding the appropriate utility/recurring maintenance allowance. MIHA is paid at the start of the OHA. For detail computation procedures, see Appendix K.

U10102 DETERMINING MONTHLY RENT

A. **General.** Monthly rent is the amount paid per month by a member for possession and use of private sector

housing. The term “private sector housing” includes a mobile home or boat. The rent stated in the lease or as otherwise agreed to by the landlord and the tenant in a written document must be used in OHA computation. The cost of a separate lease for parking at/in the vicinity of the private sector housing also should be added to the member’s dwelling lease amount in determining the member’s total rental amount. ***The cost of parking at the place of duty is not included in rent.*** The following rules apply for determining rent.

1. A recurring condominium or homeowner association fee, paid by the member, is prorated to a monthly charge and incorporated into the member’s rent.
2. See par. U10102-C for a member-owned dwelling place.
3. A sharer’s monthly rent is determined by dividing the total monthly rent by the number of sharers occupying the dwelling.
4. ***In an arrangement by which a member pays rent in advance and the landlord agrees to reimburse the member all or substantially all of the rental money at the end of the lease agreement, the amount of rent used in computing a member’s OHA is zero.***
5. Re-compute OHA if/when the rent changes.

B. **Sharers.** See ***NOTE*** below. A sharer is authorized up to the maximum rental allowance set for a member-without-dependents unless accompanied by one or more dependents. A sharer accompanied by a dependent is authorized up to the maximum rental allowance set for a member-with-dependents. Compute the OHA to which each sharer is authorized by adding the:

1. Sharer’s prorated share of the rent paid or the maximum rental established for the sharer’s grade and locality, whichever is less, plus
2. Prorated monthly Utility/Recurring Maintenance Allowance.

A member authorized MIHA (see par. U10104 and Appendix N for specific rules) receives a full rather than prorated “Miscellaneous” allowance. ***Only one sharer may claim reimbursement for any individual rent or security-related expense.***

NOTE: A renter living in a completely separate unit of an owner-owned multiplex dwelling as described in par. U10102-C4 is not a “sharer”, and OHA is determined as if the renter occupied an unattached unit.

C. **Private Sector Housing Owned**

1. Divide the actual purchase price of the private sector housing by 120 to derive the monthly “rent” for a member-owned private sector housing. ***Settlement costs, fees for title search, other legal and related costs are not included in determining the actual purchase price. NOTE: For members in the Azores who purchased homes on/after 1 January 1999, divide the purchase price by 24.***
2. The amount of any personal installment type loans and real estate equity loans obtained for the purpose of renovating, or repairing the current dwelling place are added to the actual purchase price before determining the rent.
 - a. Definitions:
 - (1) Renovating: Restoring to a previous condition, as by remodeling.

- (2) Repairing: Restoring to sound condition after damage or injury. Fixing, setting right, renewing or refreshing.
- b. *Loans used to furnish or decorate a home (including such things as the addition of a Jacuzzi or pool to a home purchased without such an amenity) or loans for personal reasons, or credit card or line of credit loans may not be used.*
- c. The Service concerned must adjudicate loans for purposes not specified above. The request with all documentation should be submitted by the member's command to:

- (1) Army - Through appropriate command channels to: HQDA (DAPE-PRC), 300 Army Pentagon, Washington, DC 20310-0300;
- (2) Navy - Through appropriate command channels to: Deputy Chief of Naval Operations (M&P); Washington Staff/Chief of Naval Personnel (N130E), 2000 Navy Pentagon, Washington, DC 20350-2000;
- (3) Marine Corps - Through appropriate command channels to: Headquarters U.S. Marine Corps, Manpower and Reserve Affairs (MPO), 3280 Russell Road, Quantico VA 22134-5103;
- Effective 17 August 2006**
- * (4) Air Force - Through appropriate command channels to: HQ USAF/A1SF, 1040 Air Force Pentagon, (Room 4E235), Washington, DC 20330-1040;
- (5) Coast Guard - Directly to: Commandant (CG-1222), U.S. Coast Guard, 2100 2nd Street, SW, Washington, DC 20593-0001;
- (6) NOAA Corps - Directly to: Director, Commissioned Personnel Center, NOAA Corps (Attn: Military Advisory Panel Member), PDTATAC (CPC1), 1315 East-West Highway, Room 12100, Silver Spring, MD 20910-3282;
- (7) U.S. Public Health Service - Directly to: Office of Commissioned Force Management, (Attn: PDTATAC MAP Member), 1101 Wootton Parkway, Plaza Level, Suite 100, Rockville, MD 20852-1061

3. *If a member (or a member's dependent) inherits a dwelling or residence or otherwise receives it without purchasing it, the purchase price of the dwelling or residence is \$0.* In this case, the member is authorized to receive the utility/recurring maintenance allowance.

NOTE: If a member obtains a mortgage on the inherited dwelling or residence specifically i.e., for home improvements or takes out a loan to pay inheritance taxes on the residence or dwelling, the cost of the mortgage or loan may be used as a housing cost for OHA purposes.

Effective 1 October 2005

4. If the dwelling is a multiplex unit, owned by a member, the allowance claimed is based on the percentage of the multiplex unit's square footage occupied by the member and dependents, times the same percent of the purchase price divided by 120. If the member and dependents live in 1,200 square feet (40%) of a 3,000 total square feet multiplex unit, and the total purchase price of the multiplex unit is \$300,000, divide the actual purchase price of the multiplex unit by 120 to derive the monthly 'rent' for the multiplex unit which is \$2,500. \$1,000 (40% of \$2,500) may be claimed for OHA rental purpose. Renters of other units within the multiplex unit are not 'sharers'.

5. If the dwelling place owned by the member is a mobile home or boat, the monthly lot rental or berthing fee paid is added to this amount.

D. Maximum Rental Allowance. The maximum amount of monthly rent considered in computing the amount of OHA payable is contained in <https://secureapp2.hqda.pentagon.mil/perdiem/allooha.html>.

U10103 UTILITY/RECURRING MAINTENANCE ALLOWANCE

A. Monthly Allowance

1. The utility/recurring maintenance allowances for each OHA locality are found in the OHA locality tables at <https://secureapp2.hqda.pentagon.mil/perdiem/allooha.html> and are based on member (with-dependents) reported expenses of members who pay all or a majority of their utilities,
2. Covers the utility costs for 80 percent of members assigned to an area,
3. Is paid to sharers (see par. U10000-C) on a pro rated amount of the net allowance,
4. Is paid to members 'without dependents' (who *are not* sharers) at 75 percent of the 'with-dependents' rate, and
5. Is eliminated or paid on a percentage basis if all or parts of the utilities are included in rent.

B. Rent Includes All, No, or Some Utilities

1. When rent does not include utilities or the member is a homeowner, the member is authorized the utility/recurring maintenance allowance in par. U10103-A.
2. When rent includes all utilities, a member is not authorized the utility/recurring maintenance allowance. However, the appropriate utility/recurring maintenance allowance in par. U10103-A is added to the member's rental allowance when computing the OHA.
3. When rent includes some utilities, a member is not authorized all of the utility/recurring maintenance allowance in par. U10103-A. The locality *climate code* and the *utility point score* determine the percentage of the utility/recurring maintenance allowance amount the member is authorized. However, the amount to which the member is not authorized is to be added to the appropriate rental allowance ceiling when computing the OHA.
 - a. Climate Codes. Locality climate codes are indicated on each locality table (see PDTATAC website at <https://secureapp2.hqda.pentagon.mil/perdiem/allooha.html>). The three climate codes include:
 - (1) Code 1 (Cold) – long-term mean temperature of 45 degrees F or colder,
 - (2) Code 2 (Moderate) – neither Code 1 nor Code 3, and
 - (3) Code 3 (Hot) – long-term average of 69 degrees F or warmer, except when long-term average for one or more months of the year drops to 45 degrees F or colder. In such instances, a climate code of 2 is assigned.
 - b. Climate Code Utility Points. Use the table below to determine the correct climate code and then credit the member with appropriate points for each utility/service that is not included in the rent. The final number is the member's total utility point score.

PROPORTIONAL MEAL RATE. The average of the standard Government meal rate and the meals portion of the applicable M&IE rate (see <https://secureapp2.hqda.pentagon.mil/perdiem/perdiemrates.html>), rounded to the nearest dollar.

REDUCED PER DIEM. Per diem rate that is reduced when authorized by an agency when there are known reductions in lodging and meal costs or when the subsistence costs can be determined in advance and are lower than the prescribed per diem rate.

REPEAT TRAVEL ORDERS. See *BLANKET TRAVEL ORDERS*.

RESERVE COMPONENT. The

1. Army National Guard of the United States,
2. Army Reserve,
3. Naval Reserve,
4. Marine Corps Reserve,
5. Air National Guard of the United States,
6. Air Force Reserve,
7. Coast Guard Reserve, and
8. Reserve Corps of the Public Health Service.

RESIDENCE-TYPE QUARTERS. Quarters that are not hotel or hotel-like accommodations.

Effective 27 April 2006

SECRETARIAL PROCESS. Action by the Per Diem Committee Principal member or a subordinate level specified by the Principal. The Secretarial Process is (or the Processes are) in administrative and/or procedural directives issued under par. U1010-B.

SECRETARY CONCERNED. As defined in 37 USC §101(5), the Secretary of:

1. The Army, with respect to matters concerning the Army;
2. The Navy, with respect to matters concerning the Navy, the Marine Corps, and the Coast Guard when it is operating as a Service in the Navy;
3. The Air Force, with respect to matters concerning the Air Force;
4. Homeland Security, with respect to matters concerning the Coast Guard when it is not operating as a Service in the Navy;

5. Commerce, with respect to matters concerning the National Oceanic and Atmospheric Administration; and
6. Health and Human Services, with respect to matters concerning the Public Health Service.

When this term is used in the JFTR, the Secretary concerned may authorize action by the PDTATAC Principal, without further delegation.

SEPARATED FROM THE SERVICE. Unless otherwise qualified, all separations except relief from active duty, placement on the TDRL, retirement, or transfer to the Fleet Reserve or Fleet Marine Corps Reserve.

SERVICE CHARGE FOR USE OF GOVERNMENT QUARTERS. Cost of maid service and fee for electricity.

SERVICES. See *UNIFORMED SERVICES*.

SHORT DISTANCE MOVE. A move:

1. Involving HHG drayage or shipment for a short distance between residences;
2. To or from a NTS facility in the member's PDS area;
3. In the member's last PDS area when the member is authorized a final move during a separation or retirement;
4. Incident to reassignment or PCS to a new PDS near the old PDS;
5. Between residences within a metropolitan area; or
6. Not during a PCS, a move between residences within the daily commuting distance of the PDS.

NOTE: A short distance HHG move includes necessary packing, crating, hauling, unpacking and uncrating.

SPARE PARTS FOR A POV. See *POV, SPARE PARTS*.

SPECIAL CONVEYANCE. Commercially rented or hired vehicles other than a POC and other than those owned or under contract to an agency.

STANDARD CONUS PER DIEM RATE. The per diem rate for any CONUS location not included in a defined locality (county/area) in the CONUS per diem rates at <https://secureapp2.hqda.pentagon.mil/perdiem/perdiemrates.html>.

STANDARD GOVERNMENT MEAL RATE. See definition of "Government Meal Rate" for current rates. The daily rate charged for meals in a Government dining facility including the operating cost.

APPENDIX R

JFTR/JTR, Appendix R applies to Uniformed Members and DOD civilian employees (JFTR, par. U1000 and JTR, par. C1001-C). It is derived from the Federal Travel Regulation (FTR) and references are cited within Appendix R.

CONFERENCES

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APPENDIX R*PART I: CONFERENCE PLANNING POLICY (FTR §301-74)**

A. Authority. OMB Bulletin No. 93-11, dated 19 April 1993, To The Heads of Executive Departments and Establishments, Subject: Fiscal Responsibility and Reducing Perquisites, Attachment 5.

B. Policy. (FTR §301-74) The public interest requires that the Uniformed Services and DOD agencies exercise strict fiscal responsibility when selecting conference sites. Accordingly, the Services and agencies must select conference sites that minimize conference costs. When Service/DOD Agency representatives attend conferences sponsored by others, the Service/DOD Agency must keep its representation to a minimum consistent with serving the public's interest.

C. Scope and Coverage. This guidance applies to all Executive Departments, agencies and the Uniformed Services that sponsor conferences or pay for travel to conferences. In addition to conference travel by Service members and DOD civilian employees, this guidance applies to conference travel paid for persons invited to travel in support of Government programs.

D. Definitions

1. Conference: A meeting, retreat, seminar, symposium or event that involves attendee travel. Also applies to training activities that are conferences under 5 CFR 410.404. ***NOTE: This does not include regularly scheduled courses of instruction conducted at a Government or commercial training facility.***

2. Conference costs: All costs paid by the Government for a conference, whether paid directly or reimbursed by a Uniformed Service or DOD Agency. See par. F. Examples include:

- a. Attendee's travel costs (i.e., travel to and from the conference, ground transportation, lodging, meals and incidental costs),
- b. Attendee's time costs (i.e., the cost of attendee's time spent at the conference and traveling to and from the conference),
- c. Meeting room and audiovisual costs,
- d. Registration fees (with or without furnished meals other than refreshment/snacks),
- e. Speaker fees,
- f. Conference-related administrative fees, and

g. Similar costs.

3. Conference lodging allowance: The lodging allowance that is up to 25 percent above the established geographical lodging portion of the per diem rate (rounded up to the next higher dollar). The per diem M&IE remains unchanged.

4. Site: Refers to both the geographical location and the specific facility selected.

E. Actions Required. When planning a conference, the Uniformed Service or DOD Agency (FTR §301-74.3) must:

1. Determine which conference expenditures provide the greatest advantage to the Government, by

a. Ensuring appropriate management oversight of the conference planning process,

b. Performing cost comparisons of the size, scope, and location,

c. Determining if a Government facility is available at a lesser rate,

d. Considering conference alternatives, e.g., teleconferencing,

e. Maintaining written documentation of the alternatives considered and the selection rationale used, and

f. Minimizing cost by exercising strict fiscal responsibility in determining the best site.

2. Minimize the conference administrative costs,

3. Minimize the attendees' travel costs,

4. Minimize the attendees' time costs,

5. Use Government-owned or Government provided facilities as much as possible,

6. Identify ways to save costs in selecting a particular conference site (e.g., lower off-season rates), and

7. Develop and establish internal policies that ensure these standards are met.

NOTE: Individuals must have the requisite contracting authority to obligate the Government in connection with conference arrangements.

F. Cost Considerations. When planning a conference, the Uniformed Service or DOD Agency should consider all direct and indirect conference costs paid by the Government. Conference costs to be considered include:

1. Travel and per diem expenses,

2. Rent of rooms for official business,

3. Usage of audiovisual and other equipment,
4. Computer and telephone access fees,
5. Light refreshments for morning, afternoon, or evening breaks excludes alcoholic beverages and includes: coffee, tea, milk, juice, soft drinks, donuts, bagels, fruit, pretzels, cookies, chips, muffins, and similar items, ***NOTE: When a majority of the attendees (at least 51%) are in a travel status (see Appendix A), refreshments may be provided for all attendees (including local attendees);***
6. Printing,
7. Registration fees,
8. Ground transportation, and
9. Attendees' travel and time cost.

G. Cost Comparisons. When planning a conference, Uniformed Services and DOD Agencies must do cost comparisons to ensure the greatest benefit to the Government. Cost comparisons include:

1. Determination of lodging adequacy at the established per diem rate,
2. Overall convenience,
3. Fees,
4. Meeting space availability,
5. Equipment availability, e.g., audiovisual, fax,
6. Commuting or travel distance of most attendees, and
7. Other conference expenses.

H. Conference Site Selection (FTR §301-74.5)

1. Documentation. (FTR §301-74.19) The Uniformed Service or DOD Agency concerned must maintain a record of the cost of each alternative conference site considered for each conference sponsored or funded, in whole or in part, for 30 or more attendees. A minimum of three sites must be considered for the conference and the documentation must be available for inspection by the Office of the Inspector General or other interested parties.
2. Locality Per Diem Rate. (FTR §301-74.6; 74.7) Initial selection of a location must be based on the established per diem rate; however, to provide flexibility in the selection of the appropriate lodging facility at the most advantageous location, the lodging portion of the established per diem rate may be exceeded by up to 25 percent, if necessary. For example, if the established geographical lodging portion of the per diem rate is \$100, then facilities with lodging rates up to \$125 may be considered when selecting the conference location.

3. Conferences Conducted in the District of Columbia. (FTR §301-74.17) Prior to scheduling, contact should be made with the GSA Public Buildings Service (PBS) of the National Capital Region to inquire about the availability of short-term conference and meeting facilities in the District of Columbia. A Customer Desk Guide can be found at the following website:

http://www.gsa.gov/attachments/GSA_PUBLICATIONS/pub/CustomerGuidebookmarkedversion.pdf.

NOTE: *This website is case sensitive.*

I. Requirements for Attendance, Sponsoring or Funding a Conference at a Place of Public Accommodation (FTR §301-74.14; 74.15)

1. Attendance at a conference must be authorized by an official designated through the Secretarial Process.
2. Sponsoring or funding a conference by a Uniformed Service or DOD Agency at a place of public accommodation must be authorized by an official designated through the Secretarial Process.
3. FEMA-approved accommodations must be used when sponsoring or funding a conference, in whole or in part, at a place of public accommodation in the U.S. where applicable. The official designated by the Secretarial Process for authorizing the sponsoring and/or funding of a conference can make a written determination on an individual case basis that waiver of the requirement to use FEMA-approved accommodations is necessary and in the public interest for a particular event.

J. Advertisement or Application Form for Conference Attendance. (FTR §301-74.16) Any advertisement or application for attendance at a conference sponsored or funded by a Uniformed Service or DOD Agency must include notice:

1. That attendees must use FEMA-approved place of public accommodation unless a waiver has been issued as indicated in Part 1, item I3, and
2. Of the prohibition of use of non FEMA-approved places of public accommodation to all non-Federal entities, e.g., contractors, to which the Uniformed Service or DOD Agency provides Federal funds.

K. Selection of Attendees. Uniformed Services and DOD Agencies must establish policies that reduce the overall cost of attending a conference. The policies and procedures must:

1. Limit the Uniformed Service's or DOD Agency's representation to the minimum number of attendees necessary to accomplish the Agency's mission; and
2. Provide for travel expense consideration when selecting attendees.

L. Conference Administrative Costs. Conference administrative costs may not be included in an attendee's per diem allowance payment for attendance at a conference. Per diem is intended only to reimburse the attendee's subsistence expenses. Administrative costs must be paid separately.

M. Conference Lodging Allowance. The Conference Lodging Allowance is a pre-determined allowance of up to 125 percent of the applicable locality lodging per diem rate (rounded to the next highest dollar) and:

1. Is not an actual expense allowance,

2. May not be used if the lodging rate exceeds the established lodging allowance by more than 25 per cent (e.g., locality lodging rate \$100; maximum conference lodging rate can be \$125), and
3. May not be used concurrently with the actual expense method of reimbursement.

N. Conference Lodging Allowance Approval Authority (FTR, §301-74.24)

1. Government Sponsored Conference. Only a designated senior official of the sponsoring agency may determine that a conference lodging allowance is necessary, and authorize the conference lodging allowance rate. All agencies must use that rate in reimbursing their attendees' lodging expenses (FTR, §301-74.8).
2. Non-government Sponsored Conference. The AO may authorize a member to be reimbursed for lodging expenses incurred up to the conference lodging allowance rate (FTR, §301-74.9).

NOTE: If the Conference Lodging Allowance is inadequate, see JFTR, Chapter, 4, Part C, or JTR, Chapter 4, Part M for actual expense authorization reimbursement procedures.

O. Conference M&IE Rate

1. Light Refreshments. When the Government furnishes light refreshments at nominal or no cost to the attendee, no deduction of the attendee's M&IE allowance is permitted.
2. Meals Included in Registration Fee. When the Government furnishes one or two meals at nominal or no cost, or includes them in the registration fee, the proportional meal rate applies to Uniformed Service members and DOD civilian employees for each day meals are furnished. See Part II, item I of this Appendix for PMR computation examples.

P. Guidance for Conference Planning: Refer to FTR, Chapter 301, Appendix E for conference planning guidance procedures, which is necessary to plan a successful conference. Website address is:
<http://www.gsa.gov/Portal/gsa/ep/channelView.do?pageTypeId=8199&channelPage=%2Fep%2Fchannel%2FgsaOverview.jsp&channelId=-14863>.

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APPENDIX R*PART II: CONFERENCE ATTENDANCE**

A. General. DOD civilian employees and Uniformed Service members may attend and participate in conferences/meetings of recognized professional organizations to maintain and further their professional competency at Government expense (including TDY expenses), subject to the availability of funds and the employees'/members' work responsibilities.

B. Authority. Title 5 USC §4110 and 37 USC §412 authorizes conference attendance expenditures for meetings concerned with the functions and activities of the Uniformed Services/DOD Agency which contribute to improved conduct, supervision, or management of the component's functions and activities are authorized as a necessary expense. This authority applies to attendance at technical, scientific, professional, or similar private membership non-Federal societies and organizations (38 Comp. Gen. 800 (1959) and 55 Id. 1332 (1976)). This authority is independent of the training authority included in JTR, par. C4500 and JFTR, par. U1050 unless it is administratively determined that training is the primary purpose of attendance at a meeting.

C. Government Sponsored Conferences. Attendance at Government expense may be authorized for the following:

1. Conferences sponsored or cosponsored by a Federal agency at which a member's/DOD civilian employee's attendance is required in the performance of official duties;
2. Conferences of state/municipals government organizations, or of international agencies in which the Federal Government is officially participating, and the member's/DOD civilian employee's attendance is related to official duties or for the purpose of transacting Government business;
3. Conferences of a group of individuals representing private interests, but convened for the purpose of transacting business directly related to the Uniformed Service's or DOD Agency's functions or activities and attendance is in the member's/DOD civilian employee's official performance; and
4. Similar activities.

D. Non-Government Sponsored Conferences

1. General. Conference attendance at non-Federal technical, scientific, professional, and comparable private membership organizations is subject to the conditions in JFTR pars. U2555-D2, U2555-D3, U2555-D4 or JTR, pars. C4955-D2, C4955-D3, and C4955-D4.
2. Attendance and Approval Requirements. Attendee selection and approval is subject to Uniformed Service/DOD Agency regulations consistent with the regulations on acceptance of payment from a non-federal source for travel Expenses (see the Joint Ethics Regulation (JER), DOD 5500.7-R, at http://www.defenselink.mil/dodgc/defense_ethics/ethics_regulation/index.html).
3. Purpose. Uniformed members and DOD civilian employees may attend conferences at Government expense to:

- a. Further their Service or DOD Agency programs;
- b. Present scientific and technical papers which further the development of the U.S. resources; and
- c. Maintain an effective professional, scientific, technical, managerial, and supervisory workforce.

4. Security. An appropriate security officer at the activity concerned should examine the security implications for attendance at all meetings and conferences conducted or sponsored by private or international organizations. Members/DOD civilian employees who attend such meetings must be briefed about security implications, when necessary, prior to attendance.

E. Registration Fees and Miscellaneous Expenses

1. When Travel Is Involved. Registration fees authorized in the travel order/authorization or approved on a travel claim voucher are reimbursable. The proportional meal rate applies on any day that the cost for one or two meals is included in the registration fee (JTR, par C4554-B and JFTR, par. U4165-2b). Information should be included on the travel order/authorization as to whether or not the registration fee includes charges for meals, and if so, the number of meals and the dates on which furnished. When the registration fee includes lodgings without charge, only the applicable proportional per diem or TDY locality M&IE rate prescribed in <https://www.secureapp2.hqda.pentagon.mil/perdiem/perdiemrates.html> is paid.

2. When No Travel Is Involved. The registration fee may be reimbursed when attendance is authorized for a conference in the local area that:

- a. Does not involve travel,
- b. Does not involve per diem, and
- c. For which a travel order/authorization is not issued.

3. Limitation on Reimbursement for Meal Costs when Attending a Conference/Meeting Sponsored by a Uniformed Service or DOD Agency. The cost of each meal, whether included in a registration fee or contracted for separately, at a Uniformed Service or DOD Agency sponsored conference/meeting must be identified. The total amount paid by the Government for meals cannot exceed the locality meal rate prescribed for the TDY assignment location (if travel is involved) or the meeting location (when travel is not involved), unless AEA reimbursement for the meal(s) involved has been authorized/approved in accordance with JFTR, Chapter 4, Part C and/or JTR, Chapter 4, Part M. When travel is involved, the maximum contracted amount for 1 or 2 meals cannot exceed the difference between the locality meal rate and the PMR.

4. Miscellaneous Expenses. Independent charges/fees for light refreshments/snacks are not a reimbursable expense.

5. Conferences/Training at the PDS: Payment of registration fees, meals, lodging, travel, and/or other expenses required for conferences/training at the PDS cannot be paid as travel allowances per 37 USC §404. For authority to pay related training costs at the PDS see 10 USC §2013; 5 USC §4109; 42 USC §218a; and 14 USC §469. The costs must clearly be an integral part of the training (39 Comp. Gen. 119 (1959); and B-244473, 13 January 1992). When training events require lodging and subsistence costs at the PDS, authority for training expense payment is made through the training and/or comptroller personnel using the above legal authority. ***This regulation is not the authority for this payment nor is it a travel and transportation allowance.***

Charges/fees for light refreshments/snacks are reimbursable ONLY when included as part of the conference registration fee.

F. Membership Fees and Dues. The Secretary Concerned or DOD Agency Head may pay membership fees or dues from appropriated funds when the membership is in the Government's interest and the membership is in the Uniformed Service's or DOD Agency's name (e.g., Per Diem, Travel and Transportation Allowance Committee). (31 Comp. Gen. 398 (1952); 33 id. 126 (1953)).

G. Entertainment Expenses. Entertainment expenses for social events and other personal expenses not directly required by official duties are not reimbursable.

Effective 30 May 2006

H. Advance Payment of Discounted Conference or Training Registration Fee (adapted from FTR §301-74.25)

1. General. It is a general practice for conference planners to offer discounted "early bird" registration fees, which are available in the months prior to the beginning of the conference. To take advantage of such specials, travelers should be given oral or written authorization to register early, charge the registration fee to their IBA, and claim reimbursement for the discounted registration fee as soon as a written order to attend the conference has been generated. When the authorization to register early is oral, the written order must reference the oral authorization for the early registration.

2. Traveler is Unable to Attend an Event for which Reimbursement Was Made in Accordance with Par. U2555-H1 (adopted from FTR §301-74.26) In all cases in which a traveler is unable to attend an event for which a discounted registration fee was paid and reimbursed in advance of the event, the traveler must seek a refund of the registration fee and repay the advance with any refund received. If no refund is made, the Service concerned must absorb the advanced payment as a preparatory travel expense if the traveler's failure to attend the event was caused either by a decision of the Service concerned or for reasons beyond the traveler's control that are acceptable to the Service concerned, e.g., unforeseen illness or emergency. ***If no refund is made, and the traveler's failure to attend the scheduled event is due to reasons deemed un-excusable by the Service concerned, the traveler must repay the amount advanced.***

Effective 3 March 2005

I. Guidance from the Comptroller General of the United States Concerning Reasonable Conference Costs Including Meals and Light Refreshments at a Formal Conference. Following is the Digest portion of the Comptroller General Decision (B-300826, 3 March 2005) rendered to the National Institutes of Health concerning reasonable conference costs. The complete decision is available at <http://www.gao.gov/decisions/appro/300826.htm>.

Decision

Matter of: National Institutes of Health - Food at Government-Sponsored Conferences

File: B-300826

Date: March 3, 2005

DIGEST

The National Institutes of Health (NIH) may pay for legitimate, reasonable conference costs, including meals and light refreshments, of a formal conference pertaining to Parkinson's disease subject to the conditions outlined herein.

A formal conference typically involves topical matters of interest to, and participation of, multiple agencies and/or nongovernmental participants. In addition, other indicators of a formal conference include registration, a published substantive agenda, and scheduled speakers or discussion panels. An agency hosting a formal conference may consider the cost of providing meals and refreshments to conference attendees an allowable conference cost as long as:

- (1) Meals and refreshments are incidental to the conference,
- (2) Attendance at the meals and when refreshments are provided is important for the host agency to ensure full participation in essential discussions, lectures, or speeches concerning the purpose of the conference, and
- (3) The meals and refreshments are part of a formal conference that includes not just the meals and refreshments and discussions, speeches, or other business that may take place when the meals and refreshments are served, but also includes substantial functions occurring separately from when the food is served.

The NIH conference here satisfies these three criteria. Without statutory authority to charge a fee and retain the proceeds, NIH may not charge a registration or other fee to defray the costs of providing meals or light refreshments. An appropriation establishes a maximum authorized program level, and an agency, without specific statutory authority, may not augment its appropriations from sources outside the government.

In applying this decision, NIH should develop an agency policy specifying the types of formal conferences at which NIH may consider providing food. NIH also should develop procedures to ensure that the provision of meals and refreshments meet the criteria listed above.

We (GAO) expect agency counsels, as well as certifying officers, agency auditors, and Inspectors General, to apply these criteria. To the extent that agency officials are uncertain as to the applicability of the criteria in particular circumstances, they may request a decision from this office, pursuant to 31 USC §3529, before proceeding.

J Proportional Meal Rate (PMR) Computation Examples. The following examples show how to compute the PMR and a PMR voucher. PMR is an amount based on the locality meal rate and the Government meal rate. ***Disclaimer: The numbers in this example are for illustrative purposes only. Please check JFTR or JTR, [Appendix A](#), for the current GMR.***

- 1. The examples below using the Standard CONUS M&IE rate of \$39.00 show how to compute a PMR amount. The \$39.00 consists of \$36.00 for meals and \$3.00 for incidental expenses. In the example, the Government Meal Rate (GMR) used is \$8.00.

Example computation rules: the PMR is an average of two rates – (1) the locality meal rate and the GMR which are added, (2) averaged and rounded up to the nearest dollar. To compute the Proportional M&IE rate, (3) add the appropriate incidental expense rate, and (4) the total becomes the proportional M&IE amount.

| | | |
|--------|--|------------------------------|
| Step 1 | Add the locality Meal rate and the GMR | $\$36.00 + \$8.00 = \$44.00$ |
| Step 2 | Divide step 1 total in half (rounded up to the dollar) | $\$44.00 / 2 = \22.00 |
| Step 3 | Add step 2 total to the incidental expense amount | $\$22.00 + \$3.00 = \$25.00$ |
| Step 4 | Proportional per diem is step 3 total | \$25.00 |

NOTE: Per diem rates shown under the Rates & Allowances banner on the PDTATAC website contain pre-computed PMRs. The website is <https://secureapp2.hqda.pentagon.mil/perdiem/>.

2. **PMR Voucher Computation Example:** An employee/member is TDY for 3 days to a conference at CONUS location (Standard CONUS rate apply). Lodging is \$55/night and GMR is \$8.00. Government furnished meals are not available for the first and last day however two Government meals are available for the second day. AO authorizes a PMR of \$25.00 for the second day. **NOTE: Government mess deductions are not deducted for arrival and departure travel days (JTR, par. C-4553-C2 and JFTR, par. U4147).**

ITINERARY:

| | |
|-------|-----------------------------|
| Day 1 | Depart Residence/Arrive TDY |
| Day 2 | TDY |
| Day 3 | Depart TDY/Arrive Residence |

REIMBURSEMENT:

| <u>Date</u> | <u>Computation</u> | <u>Total</u> |
|-------------|--|--------------|
| Day 1 | $(\$39 \text{ (M\&IE)} \times 75 \text{ maximum \%}) = \$29.25 + \$55 =$ | \$ 84.25 |
| Day 2 | $\$25 \text{ (PMR)} + \$55 =$ | 80.00 |
| Day 3 | $\$39 \times 75\% =$ | 29.25 |
| TOTAL | | \$ 193.50 |

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