TRANSFERRED OFFICERS’ COMPENSATION
DETERMINATION 1 OF 2001

INFORMATION KIT

Education Teaching Service

December 2003
Introduction

The benefits that teachers may be eligible for upon relocation are contained in the Transferred Officers’ Compensation Determination No 1 of 2001 (referred to as “the Determination”). This Determination rescinds and replaces the consolidated Determination 132 of 1984.

A copy of the Determination is attached and applies to all permanent full time and part time teachers who have been deemed “transferred officers” for the purposes of the Determination. See clause 1(u) for details.

Procedures together with the appropriate forms are also provided in the attached information kit. These procedures should be read carefully in conjunction with the provisions of the Determination before entering into any relocation arrangements.

Should you not be clear on any aspect of the procedures please contact the Personnel Support Officer in your new district office on 131 536.

A statement appears on your appointment notice which indicates whether your appointment meets the service requirements of the Determination for you to be deemed a transferred officer. This statement refers to your general eligibility and each benefit has its own provisions and time constraints.

Fringe Benefits Tax (FBT)

You should be aware that when the Department provides its employees with benefits there may be an FBT implication. While most benefits under the Determination fall into exempt categories for FBT purposes, there are some circumstances where there will be a tax liability for the Department.

Where the Department incurs FBT for benefits provided to its employees, the Commonwealth requires certain benefits to be disclosed on the individual employee’s payment summary (formerly group certificate). This is known as a Reportable Fringe Benefits Amount (RFBA) and usually appears in a box in the top right hand corner of the payment summary.

The following relocation benefits attract FBT:

- certain payments in respect of purchase and/or sale of residential premises:
  - where the Australian Taxation Office’s time limit for purchase or sale is exceeded
  - where there is a purchase only, the stamp duty is not exempt

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where you are paid cents per kilometre for relocation transport – the departmental rate exceeds the Australian Taxation Office rate and the difference is a fringe benefit

- a relocation subsidy payment on first appointment (a separate benefit not contained in the Determination)

- reimbursement of expenses incurred under clause 11, Education of Children.

You will not have an income tax or FBT liability when you have an RFBA on your payment summary. However, the amount is used to assess eligibility for other Commonwealth benefits and obligations, for example Medicare levy. For further information or enquiries a fact sheet is available from the Australian Taxation Office which will provide details on likely impacts and thresholds.

FBT publications are available on the Australian Taxation Office internet site at: www.ato.gov.au.

There is also a Fringe Benefits Tax Information Line on 13 33 28 and a fax back service on 13 28 60.

**Enquiries**

Please ensure that you read all the information supplied.

The district office in the district that you are moving to is your contact point in relation to your relocation. Enquiries in relation to transferred officers’ compensation benefits should be directed to the Personnel Support Officer on telephone 131 536.
SECTION 1

GENERAL PROVISIONS

RELATING TO

TRANSFERRED OFFICERS’

COMPENSATION
Transferred officers are entitled to the following benefits providing they meet the individual requirements of Determination 1 of 2001. Please refer to the Determination and Sections 2-4 for more detail.

**LEAVE** (Clauses 2 & 3)

When taking up duty other than at the beginning of a school term:

- up to 2 days when seeking accommodation;
- up to 2 days for preparation and packing personal and household effects prior to removal;
- up to 2 days for arranging storage if accommodation is not available;
- leave as is necessary for travel take up duty;
- 1 day for cleaning the premises vacated and/or occupying the new premises.

If accommodation is not available at the new location:

- leave to spend 2 consecutive days and nights each month with his/her family and an additional day and night for each public holiday occurring with such weekends.

**REMOVAL OF PERSONAL AND HOUSEHOLD EFFECTS** (Clause 5)

- cost of moving personal and household effects;
- cost of insuring furniture and household effects up to $38,000 in value.

**STORAGE OF FURNITURE** (Clause 6)

- paid only if accommodation is not available;
- paid for up to 13 weeks in the Sydney Metropolitan Area and 26 weeks elsewhere;
- letters from 3 real estate agents and the Teacher Housing Authority must be provided indicating accommodation is not available.

**DEPRECIATION AND DISTURBANCE ALLOWANCE** (Clause 8)

- $1,126 is paid on a value of furniture in excess of $7,037;
- a proportional amount is paid where the value is less.

**COST OF TEMPORARY RENTED ACCOMMODATION** (Clause 4)

- available only when permanent accommodation is not available.

Commercial Rented Accommodation:

- letters from 3 real estate agents and the Teacher Housing Authority must be provided indicating accommodation is not available;

- teachers not maintaining dependent relatives may be paid 50% of the cost for 4 weeks up to $254 per week;
- if moving ahead of dependents and a residence is not available costs in excess of $51 per week for 26 weeks (13 weeks in the Sydney Metropolitan Area) up to $254 per week may be paid;
- for transferred officers with dependents - if a residence is not available board and lodging expenses may be paid according to salary and number of dependents.

Privately Owned Rented Accommodation:

- teachers may be paid up to $56-$75 per week to cover the difference between the actual rent and the officer’s weekly contribution (determined by formula);
- the amount paid depends on the number of dependent children;
- paid for a maximum of 6 months other than in exceptional circumstances;
- evidence must be provided of application to Teacher Housing Authority and written advice from a local estate agent or stock and station agent that other cheaper accommodation is not available (or statutory declaration).

TRAVEL, MEALS AND ACCOMMODATION

(Chauses 2, 5 & 7)

- motor vehicles must be comprehensively insured.

Allowances may be paid:

- to seek accommodation;
- to take up duty;
- when returning home at weekends when accommodation is not available at the new location;
- for a second vehicle when the transferred officer is paid official business rate in the position occupied prior to transfer.

EDUCATION OF CHILDREN IN YEAR 12 (Clause 11)

- if elected subjects are not available at the new location, boarding expenses in excess of $27 per week up to a maximum of $56 per week are reimbursed.

- cost of essential school clothing when a new uniform must be purchased (students commencing in Kindergarten or Year 7 are not eligible).

**SALE OF RESIDENCE AT FORMER LOCATION** (Clause 9)

- solicitor’s costs on sale and mortgage;
- real estate agent’s commission, search enquiry and agency fees;
- bank charges;
- mortgage costs on discharge.

See Schedule D of the Determination for full list.

**PURCHASE OF RESIDENCE OR LAND ON WHICH TO ERECT A RESIDENCE AT NEW LOCATION** (Clauses 9 & 10)

- solicitor’s costs on purchase and mortgage;
- stamp duty on contract and mortgage;
- search, enquiry, agency and registration fees;
- bank charges;
- certificate of compliance, survey report, pest report, building inspection report, building society/bank registration fees;
- costs on mortgage;
- telephone, electricity and gas re-connection fees;
- mail re-direction fees for one month;
- local government fees when a purchase has taken place and the residence for sale is untenanted.

See Schedule D of the Determination for full list.

**IF A TRANSFERRED OFFICER IS NOT ELIGIBLE TO CLAIM ON THE SALE BUT PURCHASES AND OCCUPIES A RESIDENCE WITHIN 15 MONTHS OF TAKING UP DUTY** (Clauses 9 & 10)

- stamp duty on the contract and mortgage;
- registration fee on transfer;
- telephone, electricity and gas re-connection;
- mail re-direction fee for one month.

See Schedule D of the Determination for full list.
Education Teaching Service

SECTION 2

ARRANGING

THE REMOVAL OF

PERSONAL

AND

HOUSEHOLD EFFECTS

December 2003
Clause 5 of the Determination outlines entitlements.

The contract for removal of household effects is currently held by Wridgways Australia Limited. A division of Wridgways – MoveDynamics, will undertake the performance of the contract.

The Department of Education and Training advises MoveDynamics of teachers who meet the requirements of clause 1(u) of the Determination.

MoveDynamics then contacts transferred officers to arrange removal of personal and household effects.

You can contact the MoveDynamics team on telephone (02) 9645 7744, facsimile (02) 9645 7755 or email at contactus@movedynamics.com.au.

The Department of Education and Training will meet insurance premium costs on furniture and household effects of declared value up to $38,000.

If temporary storage of furniture is required, prior approval must be obtained with supporting letters from real estate agents (3) and Teacher Housing Authority (1) (phone 1300 137 343) that rented accommodation is not available at the new location. These letters must be faxed direct to the District Office at your new location. See clause 6 of the Determination for more details.

**Note:** The appointment notice indicates that service requirements under the Determination are met. However, to be eligible for payment, a consequence of the transfer must be that it is necessary for the teacher to move residence. As a general rule you must move at least 50 km and must reside within 50 km of the new school. Contact the District Office at your new location to clarify your position if some doubt exists.

The Department will not meet the removal costs of any items not considered to be personal and household effects.
SECTION 3

CLAIM FOR REIMBURSEMENT

OF EXPENSES

EXCLUDING REMOVALIST

AND

CONVEYANCING COSTS
CLAIM FOR REIMBURSEMENT OF EXPENSES
EXCLUDING REMOVALIST AND CONVEYANCING COSTS

PLEASE NOTE

Please submit the claim after you take up duty. Receipts and supporting documents must be attached to the claim. If you have any queries please contact your new District Office on telephone number 131 536.

CLAIMANT DETAILS

(Please use block letters)

Surname: ...................................................................................................................
Given name(s): ...........................................................................................................
Departmental serial no: ............................................................................................
Current residential address: ....................................................................................
Contact phone no. (work): ....................................................................................... 

BANK DETAILS FOR DIRECT DEPOSIT

Financial institution name: ........................................................................................
BSB no.: ....................................................................................................................
Branch name: ............................................................................................................
Account no.: .............................................................................................................

DEPENDENT DETAILS

Please provide names of and relationships with your dependents (if any):

a) ...............................................................................................................................

b) ...............................................................................................................................

c) ...............................................................................................................................

d) ...............................................................................................................................

e) ...............................................................................................................................

Note: See clauses 1 (d), (e) and (m) of Determination 1 of 2001 for definitions of "dependents" and "partner".

December 2003
In terms of Determination 1 of 2001, claim is hereby made for refund of the following expenses incurred by me in connection with my transfer:

From: ................................................................................................................................

To: ................................................................................................................................

Entry on duty date: ........................................................................................................

I certify:

1. That the following information is correct; and

2. That no claim for reimbursement of the following has been made by me or my spouse/partner on any other organisation.

Claimants signature: ...................................................................................................

Date: ..............................................................................................................................

December 2003 3-2
COST OF PERSONAL TRANSPORT AND ACCOMMODATION –
Clauses 2 and 7

(A) REIMBURSEMENT OF COSTS WHEN SEEKING PERMANENT
ACCOMMODATION AT THE NEW LOCATION - Clauses 7(a)(i) and 2(d)(ii)

DETAILS OF CLAIM
Method of travel: private motor vehicle / rail / air / bus
Number of household members travelling: .................................................................
Date of departure from former location: .................................................................
Date of arrival at new location: .............................................................................
Date of departure from new location: .................................................................
Date of arrival at former location: ........................................................................

DETAILS OF TRAVEL
Distance claimed: .................. km

ACCOMMODATION AND MEALS CLAIM DETAILS
Amount claimed: $  ....................................................................................................

Note: Dated, itemised receipts must be provided.

(B) CLAIM FOR TRAVEL EXPENSES WHEN OFFICER AND OTHER
HOUSEHOLD MEMBERS TRAVEL TO A NEW LOCATION TO
COMMENCE DUTY – Clause 7(a)(ii)

DETAILS OF CLAIM
Method of travel: private motor vehicle / rail / air / bus
Number of household members travelling: .................................................................
Date of departure from previous location: .................................................................
Date of arrival at new location: .............................................................................

DETAILS OF TRAVEL
Distance claimed: ............ km
(C) CLAIM FOR TRAVEL EXPENSES WHEN RETURNING ON LEAVE TO PREVIOUS LOCATION - Clause 7(a)(iii)

DETAILS OF CLAIM

Dates of travel: ..................................................................................................................................................

DETAILS OF TRAVEL

Distance claimed: ........... km

GENERAL

I have a current approval to use my car on official business:

YES/NO

If "yes" indicate the rate you are paid for travel:

.............. cents per km and whether you are paid at the official business rate or the specified journey rate *

* Refer to Schedule 8, Part B of the Crown Employees (Teachers in Schools and TAFE and Related Employees) Salaries and Conditions Award for detail on travel rates.

Note: If travelling by motor vehicle, a copy of the current comprehensive motor vehicle insurance policy is required with the endorsement below (indemnity clause) contained in the policy. A copy of the motor vehicle registration may be requested to clarify the engine capacity of the motor vehicle.

INDEMNITY CLAUSE FOR COMPREHENSIVE MOTOR VEHICLE INSURANCE

At the request of the insured it is hereby understood, agreed and submitted that the insured, for the purposes of this insurance and under the authority has by intent entered into this contract of insurance not only for his own interest, but has constituted himself a trustee for the insurance, indemnity and beneficial interest of his employer under this contract: and that the expressions "insured" and "employer" in this contract shall be deemed to include Her Majesty Queen Elizabeth II, her heirs and successors.
(A) REIMBURSEMENT OF MEAL AND ACCOMMODATION COSTS – Clause 5(a)

Date of departure from former location: .................................................................

Date of arrival at new location: ..............................................................................

Amount claimed: $ .................................................................

Note: Dated, itemised receipts must be provided.

(B) PAYMENT OF REMOVAL OF PERSONAL AND HOUSEHOLD EFFECTS

Refer to Section 2 - Arranging the Removal of Personnel and Household Effects.

(C) COST OF MOVING A SECOND PRIVATE MOTOR VEHICLE WHEN THE OFFICER USES A PRIVATE VEHICLE ON OFFICIAL BUSINESS – Clause 5(c)

A current approval exists to use my private motor vehicle on official business:

Yes/No

If "yes" provide details: ..........................................................................................

Distance claimed: .............................................. km

or

Cost of transportation by road or rail transport:

Amount claimed: $ ..............................................

(D) INSURANCE OF FURNITURE AND HOUSEHOLD EFFECTS – Clause 5(d)

Transit insurance on the cost of insurance of the first $38,000 value of furniture and household effects is covered by the Determination. The officer is responsible for any additional insurance cover.

(E) ADVANCE TO COVER THE COST OF TRANSPORTING PERSONAL AND HOUSEHOLD EFFECTS

Refer to Section 2 – Arranging the Removal of Personal and Household Effects.
STORAGE OF FURNITURE – Clause 6

Letters from three real estate agents and one from the Teacher Housing Authority (phone 1300 137 343) must be obtained verifying the lack of suitable accommodation.

The letters are to be faxed to the Personnel Support Officer in your new District Office with a request for storage outlining the reasons. This must be done before the move is commenced.

DEPRECIATION AND DISTURBANCE ALLOWANCE – Clause 8

Value of furniture and effects: $ .............................................

Amount claimed: $ ...............................................................

**Note:** A copy of the inventory supplied to MoveDynamics must be provided.

*The maximum compensation for depreciation and disturbance is $1,126. This is subject to the Department being satisfied you have moved normal household furniture to the value of $7,037. A pro rata payment will be made where the value is less.*
COST OF TEMPORARY ACCOMMODATION – Clause 4

Transferred officers may only claim under either Part A or Part B.

(A) TEMPORARY COMMERCIAL RENTED ACCOMMODATION ALLOWANCE – Clause 4(1)

Required supporting documentation:

- receipts; and
- a written undertaking that any reasonable offer of accommodation will be accepted; and
- statements from the Teacher Housing Authority (phone 1300 137 343) and three real estate agents verifying the effort made to secure a residence.

(i) An officer maintaining dependent relatives, children and/or partner

Claim for temporary accommodation when all dependents have moved to the new location - Clause 4(1)(a).

DETAILS OF CLAIM

Type of accommodation: .....................................................................................
Period of claim: ........................................................ to ......................................
Amount claimed: $ ................................................................................................
Salary of transferred officer: $ .............................................................................

Claim for temporary accommodation when dependents have not moved to the new location. Prior approval to move to the new location ahead of dependents is necessary - Clause 4(1)(b).

DETAILS OF CLAIM

Type of accommodation: .....................................................................................
Period of claim: .................................................................................................
Amount claimed: $ .............................................................................................

(ii) An officer not maintaining dependant relatives, children and/or partner

Eligible to be paid an allowance of up to 50 per cent of the total cost to a maximum of $254 per week, for a maximum period of four weeks, providing permanent accommodation is not available.
DETAILS OF CLAIM

Type of accommodation: ........................................................................................................

Period of claim: ................................................................................................................... 

Amount claimed: $ .............................................................................................................

(B) TEMPORARY PRIVATELY OWNED RENTED ACCOMMODATION ALLOWANCE – Clause 4(2)

The documentary evidence required is:

• evidence of an application to the Teacher Housing Authority (phone 1300 137 343) for accommodation; and

• written acknowledgment by a local estate agent or stock and station agent that the transferred officer has been unable to secure cheaper, private accommodation of a reasonable standard, or a statutory declaration by the transferred officer to the same effect.

DETAILS OF CLAIM

Officer’s substantive salary: $ ..............................................................................................

\[
\text{officer’s weekly contribution} = \frac{\text{officer’s salary} \times (\text{officer’s salary} + 4,332)}{288,510} \times \frac{7}{365.25}
\]

Actual rent paid \hspace{1cm} $ \quad \text{per week} \\

less \hspace{1cm} \text{Officer’s weekly contribution} \hspace{1cm} $ \quad \text{per week} \\

(see formula above)

equals \hspace{1cm} \text{Excess rent} \hspace{1cm} $ \quad \text{per week} \\

Period of claim: ................................................................................................................ 

Amount claimed: $ .............................................................................................................

Note: Maximum period of claim is for six months other than in exceptional circumstances
EDUCATION OF CHILDREN - Clause 11

(A) COST OF BOARD AND LODGING – Clause 11(a)

Name(s) of dependent(s) for which a claim is being lodged:

............................................................................................................................................................
............................................................................................................................................................

Name and address of person providing board and lodging:

............................................................................................................................................................
............................................................................................................................................................

Period of claim: ............................................. to ............................................

Amount claimed (per week): $ ..............................................................

Note: Receipts and a certificate from the Department that elected subjects are not available at a school at the new location must be provided.

(B) COST OF UNIFORMS – Clause 11(b)

Names of dependent children for which a claim is made:

Name                  Class/Year

.................................................................................................................................
.................................................................................................................................
.................................................................................................................................
.................................................................................................................................

Essential school clothing required to be replaced or purchased

...........................................................................................................................................................
...........................................................................................................................................................
...........................................................................................................................................................
...........................................................................................................................................................
...........................................................................................................................................................

Amount claimed: $ ..............................................................

Note: No claim is payable where a student is commencing Kindergarten or moving from Year 6 to Year 7. Receipts must be provided.
Education Teaching Service

SECTION 4

CLAIM FOR REIMBURSEMENT

OF CONVEYANCING

AND ASSOCIATED COSTS

ON THE SALE OF A RESIDENCE

AND/OR

PURCHASE OF A RESIDENCE

OR LAND ON

WHICH TO ERECT A RESIDENCE

December 2003
CLAIMS FOR REIMBURSEMENT OF CONVEYANCING AND OTHER COSTS

Instructions

Part 1 page 4-2 To be completed by all officers

Part 2 page 4-2 Contains important information relating to provisions and is to be read by all officers

(1) Do you have a residence at the previous location which you intend to sell?

YES/NO (circle applicable response)

(2) Do you intend to purchase a residence or land upon which to erect a residence at the new location?

YES/NO (circle applicable response)

If you have answered ‘yes’ to (1) and (2) complete Parts 3 (A) and 3 (B).

If you have answered ‘no’ to (1) and ‘yes’ to (2) complete Part 4.

Part 3 (A) pages 4-5 and 4-6 To be completed when claiming for expenses incurred in selling a residence at the former location.

Part 3 (B) pages 4-7 - 4-9 To be completed when claiming for expenses incurred in purchasing a residence at the new location.

Part 4 pages 4-10 and 4-11 To be completed when purchasing at the new location within 15 months of transfer and where the officer does not meet the requirements to claim for expenses associated with Part 3.

Undertaking page 4-13 To be completed when making a claim for either sale or purchase as an individual transaction, with the remaining action to be taken at a later date, but within the period specified in the Determination.

If you do not comply with the provisions of the Determination, but wish to advance special circumstances, full details of those circumstances should be forwarded to your new District Superintendent with the completed claim form.

Claimants must attach a copy of all relevant documents, set out in the "documentary evidence required" column on the claim form, certified as being a copy of the original by your Principal, a Justice of the Peace or a nominated Departmental officer in a district office.

Completed claim forms and supporting documentation are to be sent to the Personnel Support Officer at your new District Office for checking prior to payment.

December 2003 4-1
PART 1 – PERSONAL DETAILS

Name: ..........................................................................................................................

Serial no: ......................................................................................................................

Current school: ............................................................................................................

Position: ....................................................................................................................... 

Phone (home): ........................................ (work):

Current residential address: ........................................................................................

Financial institution: ....................................................................................................

Branch name: .............................................. BSB no: ..............................................

Account No: ..................................................................................................................

PART 2 – REIMBURSEMENT CLAIM FOR CONVEYANCING COSTS – SALE AND PURCHASE OF RESIDENCE – Clause 9(a)

For entitlement to reimbursement under Clause 9(a) the officer must:

(a) sell his or her principal place of residence at the former location;

and

(b) purchase a residence or land upon which to erect a residence, which will become the principal place of residence, at his or her current location,

within a period commencing from the date of assignment to the new location or six months prior to the actual transfer, whichever is later, and ending not more that four years after the transfer.

*Note: Exception to four year limitation - Annexure A, page 4-12.*

Provided that:

(a) the maximum amounts that may be reimbursed are limited to the amounts which would be payable had the sale and purchase prices of the properties been in each case:

(i) $300,000 where the date of settlement is between 30/5/01 and 31/12/01

(ii) $315,000 where the date of settlement is between 1/1/02 and 31/12/02

(iii) $417,000 where the date of settlement is on or after 1/1/03.

(b) where simultaneous sale and purchase has not occurred, the current claim is made under either A (page 4-5 and 4-6) or B (page 4-7 – 4-9) and a further claim under A or B is to be submitted. The undertaking at Annexure B, page 4-13 is to be completed and attached to the claim.
DOCUMENTS REQUIRED WHEN CLAIMING FOR SALE AND/OR PURCHASE TRANSACTIONS

The Department requires that certain documentation be provided to support claims for reimbursement of expenses. These include:

For the sale transaction

- copy of front page of Contract for Sale – signed and dated
- solicitor's settlement statement and an itemised tax invoice containing a memorandum of account and evidencing completion of sale
- a signed undertaking that the reimbursement of expenses will be repaid by you if the purchase transaction is not completed within four years
- real estate agent’s receipt for commission and tax invoice
- copy of real estate agent’s sales agreement
- evidence from lending institution indicating mortgage discharge fees (letter or statement)
- three market appraisals on the value of 1,012m² of the land and residence, if property sold is larger
- in the case of the Contract for Sale being in the name of partners with different surnames, a copy of Marriage Certificate (if applicable), or statutory declaration indicating relationship

For the purchase transaction

- copy of front page of Contract for Sale - signed, dated and duty stamped (also required for "Purchase Only")
- solicitor's settlement statement and an itemised tax invoice containing a memorandum of account and evidencing completion of purchase
- letter from lending institution evidencing loan and amount (also required for "Purchase Only")
- itemised list of mortgage expenses from the lending institution, amount of loan and tax invoice (also required for "Purchase Only")
- mortgagee's solicitor's account and tax invoice (not applicable for "Purchase Only")
- receipt for survey fees and tax invoice (not applicable for "Purchase Only")
- receipt for building inspection fees and tax invoice (not applicable for "Purchase Only")
• receipt for pest certificate and tax invoice (not applicable for "Purchase Only")

• a signed undertaking that the reimbursement of expenses will be repaid by you if the sale transaction is not completed within four years

• three market appraisals on the value of 1,012m² of the land and residence, if property purchased is larger (also required for “Purchase Only”) 

• in the case of the Contract for Sale being in the name of partners with different surnames, a copy of Marriage Certificate (if applicable), or statutory declaration indicating relationship (also required for "Purchase Only")

**If claiming local government rates on the former residence**

• receipt for rates paid and tax invoice

• statutory declaration that the residence at the former location was untenanted, and dates involved

• evidence from the real estate agent that reasonable efforts have been made to sell the residence at the former location at a fair and reasonable price

*Note: Rates may only be claimed where the former residence being sold has been offered for sale and is untenanted after the completion of the purchase of the residence at the new location.*

**For incidental expenses**

• receipt and tax invoice showing electricity reconnection expense

• receipt and tax invoice showing gas reconnection expense (this does not include deposits on LPG gas cylinders)

• evidence of telephone installation at the former location

• receipt or account and tax invoice for telephone reconnection, showing fee involved

• receipt and tax invoice for mail redirection (one month only)

*Note: Reimbursement is made for reconnection to existing services only. Initial connection expenses are not reimbursable.*
### PART 3(A) - SALE OF RESIDENCE AT FORMER LOCATION

| Address of former residence: .......................................................... |
| Date of contract: ............................................................................. |
| Name(s) of vendor(s): ..................................................................... |
| Sale price: ...................................................................................... |
| Date sale completed: ...................................................................... |
| Size of land upon which residence is erected: ............................... |
| Date ceased to occupy former residence: ....................................... |

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount Claimed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real estate agent's commission:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Solicitor's costs on sale:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Solicitor's costs on mortgage:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Other solicitor's costs: (Please specify)</td>
<td>$ ..................</td>
</tr>
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</table>

**Disbursements**

<table>
<thead>
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<th>Item</th>
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</tr>
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<tbody>
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<td>$ ..................</td>
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<tr>
<td>Enquiry fees:</td>
<td>$ ..................</td>
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<tr>
<td>Agency fees:</td>
<td>$ ..................</td>
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<tr>
<td>Bank charges:</td>
<td>$ ..................</td>
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<tr>
<td>Sundry:</td>
<td>$ ..................</td>
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<tr>
<td>Mortgage costs on discharge:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Registration and agency on discharge:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Other:</td>
<td>$ ..................</td>
</tr>
</tbody>
</table>

### DOCUMENTARY EVIDENCE REQUIRED

- Copy of dated and signed front page of Contract for Sale
- Solicitor's letter evidencing completion of sale, copy of solicitor's settlement statement, tax invoice and itemised solicitor's account
- Real estate agent's account, payment receipt, tax invoice and copy of agency agreement
- Completed signed undertaking (page 4-13) if claiming sale transaction and a purchase transaction is yet to be completed
- Evidence from lending institution of mortgage discharge fees (letter or statement or receipt)

Office Use Only
If the property sold comprises more than 1,012m² (one quarter acre) of land or more than one flat or unit in a block of flats or units it is necessary to obtain three market appraisals at the officer’s expense from registered valuers or real estate agents on the value of 1,012m² of the block of land and residence or one flat or one unit in a block of flats or units.

**I certify:**

1. That the above information is correct; and
2. That no claim for reimbursement of the above costs has been made by me or my spouse/partner on any other organisation.

Claimant's signature: ....................................................

Date: .................................................................

Please return claim and supporting documentation to the Personnel Support Officer in your new District Office for checking prior to payment.
PART 3(B) - PURCHASE OF RESIDENCE OR LAND ON WHICH TO ERECT A RESIDENCE AT CURRENT LOCATION

| Address of former residence: | ................................................ |
| Address of property purchased: | ................................................ |
| Distance from residence purchased to new school: | ............ |
| Date of contract: | ................................................ |
| Purchaser's name(s): | ................................................ |
| Purchase price: | ................................................ |
| Date purchase completed: | ................................................ |
| Size of land upon which residence is erected: | ............ |
| Name of lending institution: | ................................................ |
| Amount of mortgage: | ................................................ |
| Date you occupied the purchased residence: | ............ |

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount Claimed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government stamp duty on contract:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Solicitor's costs on purchase:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Solicitor's costs on mortgage:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Other solicitor's costs: (Please specify)</td>
<td>$ .....................</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Disbursements</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search fees:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Enquiry fees:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Agency fees:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Registration fees:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Bank charges:</td>
<td>$ .....................</td>
</tr>
<tr>
<td>Other (specify):</td>
<td>$ .....................</td>
</tr>
</tbody>
</table>

DOCUMENTARY EVIDENCE REQUIRED

- Copy of dated, signed and duty stamped front page of Contract for Sale
- Solicitor's letter evidencing completion of sale, copy of solicitor's settlement statement, tax invoice and itemised solicitor's memorandum of account
- Mortgagee's solicitor's account and tax invoice
- Details of any stamp duty refund or exemption
- Completed signed undertaking (page 4-13) if claiming purchase transaction and a sale transaction is yet to be completed

OFFICE USE ONLY
<table>
<thead>
<tr>
<th>Item</th>
<th>Amount Claimed</th>
<th>Documentary Evidence Required</th>
<th>Office Use Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate of compliance</td>
<td>$ ..................</td>
<td>Itemised account, tax invoice and receipts detailing all payments made</td>
<td></td>
</tr>
<tr>
<td>Survey certificates</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pest certificates</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building inspection</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building society/bank registration fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Mortgage Expenses</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establishment fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Valuation fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Document handling fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan security duty (also known as mortgage stamp duty)</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Settlement fees</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solicitor’s costs</td>
<td>$ ..................</td>
<td>Letter from lending institution evidencing loan and amount and mortgage fees</td>
<td></td>
</tr>
<tr>
<td>Bank charges</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Miscellaneous Expenses - Clause 10</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone reconnection</td>
<td>$ ..................</td>
<td>Receipts &amp; Tax invoices</td>
<td></td>
</tr>
<tr>
<td>Electricity reconnection</td>
<td>$ ..................</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gas reconnection</td>
<td>$ ..................</td>
<td>Telephone account for new connection and copy of account for previous connection</td>
<td></td>
</tr>
<tr>
<td>Mail redirection</td>
<td>$ ..................</td>
<td>Electricity and gas application and connection fee receipts</td>
<td></td>
</tr>
<tr>
<td>Council or other local government rates</td>
<td>$ ..................</td>
<td>Receipt for mail redirection</td>
<td></td>
</tr>
<tr>
<td>Council or other local government rates</td>
<td>$ ..................</td>
<td>Local Government account and evidence that the residence is for sale</td>
<td></td>
</tr>
<tr>
<td>Council or other local government rates</td>
<td>$ ..................</td>
<td>Statutory Declaration for period of untenanted residency</td>
<td></td>
</tr>
</tbody>
</table>

December 2003

Page 4-8
If the property purchased comprises more than 1,012 m² (one quarter acre) of land or more than one flat or unit in a block of flats or units it is necessary to obtain three market appraisals at the officer's expense from registered valuers or real estate agents on the value of 1,012 m² of the block of land and residence or one flat or one unit in a block of flats or units.

I certify:

1. that the above information is correct; and
2. that no claim for reimbursement of the above costs has been made by me or my spouse/partner on any other organisation.

Claimant's signature: ....................................................
Date: ............................................................................

Please return claim and supporting documentation to the Personnel Support Officer in your new District Office for checking prior to payment.
Residential address at former location: .................................................................
Address of property purchased: .................................................................
Distance from residence purchased to new school:  
Date of contract:  
Date purchase completed:  
Purchase price:  
Date permanently occupied new residence:  
Size of land upon which residence is erected:  
Name of lending institution:  
Amount of mortgage:  

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount Claimed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government stamp duty on contract:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Loan security duty (also known as mortgage stamp duty)</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Registration fee:</td>
<td>$ ..................</td>
</tr>
</tbody>
</table>

Please supply details of any stamp duty refund or exemption relating to this purchase.

**Miscellaneous Expenses - Clause 10**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount Claimed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone reconnection:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Electricity reconnection:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Gas reconnection:</td>
<td>$ ..................</td>
</tr>
<tr>
<td>Mail redirection:</td>
<td>$ ..................</td>
</tr>
</tbody>
</table>

Copy of front page of dated, signed and duty stamped Contract for Sale

Solicitor's letter of evidencing completion of purchase and tax invoice

Letter from lending institution evidencing amount of loan advanced

Receipt for mail redirection
PART 4 - PURCHASE ONLY (cont)

If the property purchased comprises more than 1,012m² (one quarter acre) of land or more than one flat or unit in a block of flats or units it is necessary to obtain three market appraisals at the officer’s expense from registered valuers or real estate agents on the value of 1,012m² of the block of land and residence or one flat or one unit in a block of flats or units.

I certify:

1. that the above information is correct; and

2. that no claim for reimbursement of the above costs has been made by me or my spouse/partner on any other organisation.

Claimant’s signature: ....................................................

Date: .................................................................

Please return claim and supporting documentation to the Personnel Support Officer in your new District Office for checking prior to payment.
PART 3 - REIMBURSEMENT CLAIM FOR CONVEYANCING COSTS ON SALE AND PURCHASE OF RESIDENCE – Clauses 9(a) and (b)

The following additional eligibility provisions are to be read in conjunction with those on page 4-2.

Subject to the approval of the Director-General or his/her delegate, a transferred officer owning a residence at a former location - "A" - who finds it necessary to take up rented accommodation on a number of subsequent transfers - "B1", "B2", "B3", etc, may be regarded as covered by the provisions of this Determination relating to the reimbursement of conveyancing and incidental costs on the current transfer to "C".

Providing that:

(i) a period of not more than eight years has elapsed since the officer's transfer from "A" to the last intermediate "B" location;

(ii) the sale transaction of the residence at "A" is effected not earlier than 6 months prior to the transfer from "A" to the first intermediate "B" location and not more than four years after the transfer from the last intermediate "B" location to "C";

(iii) the purchase transaction is effected not earlier than six months prior to or not more than four years after the transfer from the last intermediate "B" location to "C"; and

(iv) the officer is deemed a transferred officer for all transfers.

This means that if a transferred officer is moved more than once and takes up rented accommodation at a centre or centres and the move to the first intermediate location and the last move are at departmental expense, then:

(i) the officer must both sell and purchase to be eligible to receive any reimbursement of expenses;

(ii) the officer has four years from taking up duty following the last move (to "C") in which to sell the residence at "A";

(iii) the officer is not eligible to receive benefits if more than eight years has elapsed since the transfer from "A" to the last intermediate "B" location; and

(iv) the officer must purchase within four years of taking up duty at the last location at "C".
ANNEXURE B

TRANSFERRED OFFICER COMPENSATION

UNDERTAKING

By: ...................................................... of ......................................................

..................................................................................................................................

(Name and present address of transferred officer)

Following my transfer from ............................................... to ...........................................
and in consideration of the Department reimbursing me the conveyancing and other expenses ("the Amount") incurred by me in respect of the *sale/purchase (*delete inapplicable word) by me of the residence situated at * ............................................

..................................................................................................................................

(* insert address of residence being sold or purchased) which would normally be due to me following the completion of both transactions in terms of clause 9 of the Determination I undertake that:

A. In the event that I do not complete both the sale and purchase transactions as required in the Determination within the period of four years as specified in subclause (b) of clause 9 of the Determination, I will, in the time period determined by the Department, taking into account the particular circumstances, refund the Amount to the Department at the end of the period; and

B. If my employment ceases, otherwise than by my death, prior to the completion of the sale and purchase transactions in respect of the last transfer, I will refund to the Department by the last day of service the conveyancing and other expenses paid by the Department on my behalf or reimbursed to me by the Department in respect of the sale or purchase of property mentioned above.

I acknowledge that this undertaking is irrevocable and is to continue until a written notification has been received either that this undertaking is no longer required by the Department by reason of compliance with clauses A and B hereof or until payment is made to the Department of the Amount.

I reserve the right to terminate my liability hereunder at any time upon payment of the Amount to the Department.

DATED at ......................... this .......................day of ...............................20 ......

Signature of transferred officer: ...........................................................

Witness: .....................................................................................................