

UINTAH SCHOOL DISTRICT POLICY ACTION REVIEW

1st Reading	01/11/2023	New	
2nd Reading	02/08/2023	Revised	X
Approved	02/08/2023	Substitute	

004.0520 TRAVEL EXPENSE/REIMBURSEMENT

REVISES POLICY 004.0520 TRAVEL EXPENSE/REIMBURSEMENT (LAST APPROVED 11/13/2019)

1.0 GENERAL POLICY STATEMENT

1.1 District personnel and officials who incur expenses in carrying out their authorized duties for reasonable and necessary travel expenses will be reimbursed by the district upon submission of a properly completed and approved travel expense voucher. Travel expenses may only be approved and incurred when budgetary allocations for the specific type of expense have been set aside.

2.0 APPROVAL

2.1 Request to travel must be approved by an employee's supervisor and the supervisor responsible for the travel budget. This approval is to be prior to travel and in writing except in an unusual circumstance. An employee on official school business is expected to exercise prudence in incurring expenses. Excessive costs, such as those caused by circuitous routes or luxury services or accommodations, will not be considered prudent and will not be reimbursed.

2.2 All travel reimbursement requests must include an agenda from the activity in which the employee participated, a written approval from the supervisor, and any other receipts for expenditures being claimed for reimbursement.

3.0 REIMBURSEMENT/ADVANCES

3.1 Employees traveling for any reason, except a national convention and as specified in 3.2, will be required to submit a voucher for reimbursement, after the employee has incurred travel expenses.

3.2 Advances will be made to employees who are traveling to national conventions. Advances may also be made to employees who may be traveling for an extended period of time at the discretion of the direct supervisor and superintendent. It is the employee's responsibility to see that all requests for advance are received by the District Business Office three weeks prior to travel. All requests for advancements shall include an agenda from the activity that the employee will be attending, and written approval from supervisor(s).

- 3.3 Employees receiving travel advances will be required to account for advanced funds by furnishing an agenda and receipts for lodging, transportation, and other expenses, upon return from travel.
- 3.4 Advanced funds not properly accounted for or not used in accordance with this policy must be returned to the Uintah School District Business Office within five business days after concluding the travel.

4.0 MEANS OF TRANSPORTATION

- 4.1 Modes of authorized transportation shall be consistent with the assignment and the efficient and economic conduct of official business. Travel will be by the most direct route. Operators of district automobiles must have a valid driver's license.
 - 4.1.1 Airfare: All airfare is to be booked through the most economical medium available. Coach tickets are to be purchased. Round-trip coach tickets should be purchased if these offer a price advantage. (Receipt required)
 - 4.1.2 Automobile:
 - 4.1.2.1 When available, a district car may be used. If a request for a district car is denied, a personal vehicle may be used and reimbursed at the current district rate. This reimbursement is based on the premise that the maximum number of travelers (up to four per vehicle) will travel together to the same function. Reimbursement will be for travel from the employee's home or work location, whichever distance is less, to the city of the conference or event and back. Mileage necessary to carry out responsibilities while at the event will also be reimbursed. Reimbursement will not be made for personal travel during the conference.
 - 4.1.2.2 Employees who choose to travel in personal vehicles to district related conferences or events will be reimbursed for that travel at the current reimbursement rate upon supervisor approval. If two or more employees are traveling to the same event in separate personal vehicles at the expense of the district, the supervisor has the option of reimbursing the employees one-fourth or one-third or one-half of the current reimbursement rate. Reimbursement will be for travel from the employee's home or work location, whichever distance is less, to the city of the conference or event and back. Mileage necessary to carry out responsibilities while at the event will also be reimbursed. Reimbursement will not be made for personal travel during the activity.
 - 4.1.2.3 Non-district employees may be transported in district vehicles with written approval of the superintendent or business administrator.

4.1.2.4 Parking charges, in reasonable amounts, are reimbursable with approved receipt or verification.

4.1.3 Local Transportation: Local transportation such as taxicabs, airport limousines, shuttles, rental cars, ubers, and buses may be used. Justification must be given on the travel voucher. (Receipt required)

5.0 LODGING

- 5.1 An employee should not pay for a room and seek reimbursement without prior written approval by the employee's supervisor. The following rules apply whether lodging is paid on a "direct bill" basis, by check, or by credit card.
 - 5.1.1 If an employee pays for their own room and seeks reimbursement, any applicable tax and additional charges on the room will not be reimbursed.
 - 5.1.1.1 If an unusual or unavoidable circumstance exists, the employee can receive reimbursement of the tax with business administrator approval.
 - 5.1.2 If an employee pays for their own room due to an emergency, the applicable taxes may be reimbursed if approved by the superintendent or business administrator.
- 5.2 The maximum allowable rate for in-state lodging is \$130 per night, or state contract rate. If this rate is to be exceeded, an employee shall obtain prior written approval of the employee's direct supervisor and budget supervisor.
- 5.3 The maximum allowable rate for out-of-state lodging is \$130 per night, plus taxes. If this rate is to be exceeded, an employee shall obtain prior written approval of the employee's direct supervisor and budget supervisor.
- 5.4 Special consideration should be made to conserve the maximum amount of money possible when booking employee rooms. The direct supervisor can determine if each employee in the group has an individual room or if rooms will have multiple occupants. Special consideration is made when an odd number of travelers are staying overnight or, in the case of male and female employees traveling together.
- 5.5 Employees traveling to a conference, where such conference is held at a hotel, may exceed the allowable rate of stay for lodging in an approved hotel in an effort to reduce expenses of other travel to and from the place of meeting. Employees should receive prior written permission from their supervisor and budget supervisor when exceeding the allowable rate of reimbursement.
- 5.6 Any group of employees on official business who need lodging for themselves in connection with that business and choose not to obtain lodging in a motel may be reimbursed at a rate of \$25.00 per night for not incurring expenses for lodging related to the travel.

5.7 If his/her spouse accompanies the employee, lodging expenses will be reimbursed for the cost of a double room at the single occupancy rate.

6.0 PER DIEM

6.1 Meal per diem for out of state travel will be determined by the Federal Government rate found at www.gsa.gov

6.2 Meal per diem for in state travel will be determined by the Salt Lake City rate found at www.gsa.gov

6.2.1 All travel per diem will not include the incidental portion of the reimbursement rate.

6.3 A per diem allowance shall be allowed only when both the period away from the Uintah School District employee's assigned station is more than four (4) hours and travel is beyond 80 miles of Uintah School District.

6.4 Per diem for the day of departure or return shall be prorated by dividing the day into four periods as follows:

<u>Leave Home Base</u>	<u>% of Per Diem</u>
1st qtr-leave between 12:01 a.m. and 6:00 a.m.	100 %
2nd qtr-leave between 6:01 a.m. and 12:00 p.m. (noon)	80 %
3rd qtr- leave between 12:01 p.m. and 8:00 p.m.	50 %
4th qtr- leave between 8:01 p.m. and 12:00 a.m. (midnight)	0 %

<u>Return Home Base</u>	<u>% of Per Diem</u>
1st qtr-return between 12:01 a.m. and 6:00 a.m.	0 %
2nd qtr- return between 6:01 a.m. and 12:00 p.m. (noon)	20 %
3rd qtr- return between 12:01 p.m. and 6:00 p.m.	50 %
4th qtr- return between 6:01 p.m. and 12:00 a.m. (midnight)	100 %

7.0 BREAKFAST, LUNCHEON OR DINNER MEETINGS

7.1 Reimbursement may be claimed for costs incurred while on official business conducted at breakfast, luncheon, or dinner meetings. Daily per diem rates will be reduced by the amount allocated for breakfast, lunch, or dinner depending on the meal furnished at the official meeting. (Receipt required)

7.2 If a breakfast, luncheon, or banquet is included in a registration fee, then per diem for that particular meal will not be paid to the employee.

7.3 If a supervisor has a group of employees at an event, the supervisor has discretion to provide a group meal. If that occurs, the total per diem rate to be reimbursed will be reduced by the cost allocated to that meal.

7.4 If an employee holds a District issued credit card which is authorized for food purchase, the employee can purchase a single meal (breakfast, lunch and/or

dinner) instead of claiming the per diem as long as the total amount charged is less than or equal to the allowed per diem for that meal.

8.0 OTHER REIMBURSABLE EXPENSES

8.1 Conference Registration Fees: Conference and convention registration fees are reimbursable as a miscellaneous expense on the travel expense voucher. District preference is for conference registration to be paid using the District Conference Registration Form (Receipt required or copy of registration form) (see Section 3.2)

8.2 Tips shall not exceed 20% of the goods or services received.

9.0 VIOLATION OR MISUSE OF TRAVEL FUNDS

9.1 All employees are expected to be reasonable and frugal when traveling at district expense.

9.2 Violations of this policy or misuse or abuse of travel funds or any falsification or misrepresentation concerning travel funds or reimbursement is grounds for disciplinary action, which may include termination.

9.3 Any funds improperly obtained or used must be promptly repaid to the district.

9.4 Any district employee who fails to travel, after requesting such travel, and incurs expenses to the district as a result of failing to cancel a hotel room, vehicle, or other items shall reimburse Uintah School District for all incurred expenses.