

## Policy — 5341

### Personnel

#### District Travel Policy and Procedure

##### General

All reimbursable travel of District employees must have been properly authorized; actually incurred; essential in achieving the goals of fulfilling the responsibility of the District; and conducted in the most economical and practical manner for the District.

The primary responsibility for proper control and compliance with District Travel Policies and Procedures is inherent in the administrative responsibility and authority of the Building Principal, Program Director or Superintendent.

##### 1. Travel Authorization

Official travel of District employees must be authorized by the Principal, Director or Superintendent.

##### 2. Approval of Travel Expenses

Travel expense vouchers must be approved for payment by the Superintendent, Personnel Director, or designated representative (s).

##### 3. Allowable Expenses

Payment of travel expense by the District is limited to costs authorized in these District Travel Policies and Procedures, unless the Board provides an exception thereto.

Travelers with disabilities: With prior approval of the Superintendent, Personnel Director or designated representative, employees with disabilities are allowed payments of certain additional travel expenses to accommodate their disabilities such as, but not limited to, subsistence and transportation of an attendant when the employee requires assistance, cost of specialized transportation, increased cost of specialized services for public carriers or special baggage handling.

##### 4. Expenses Not Allowable

The following will not be paid by the District:

A. Expenses of a personal nature incurred for the convenience of the traveler including travel by indirect routes or stopovers for personal reasons; or leaving earlier or returning later than necessary on a trip. It is acceptable for the traveler to leave their home station in reasonably sufficient time to arrive at an airport's recommended pre-departure time.

1. Notwithstanding the restrictions contained in 4.A. above, the district may reimburse an employee for travel expenses incurred during official travel which includes personal stopover to the extent the employee sufficiently documents that the cost of the entire trip (including transportation, lodging, per diem, miscellaneous expenses and compensatory time) is no more than the costs

would have been without the personal stopover. Supporting schedules must be attached to the employee's travel expense voucher.

2. Extraordinary expenses due to unusual circumstances when deemed appropriate and necessary, may be approved by the Superintendent, Principal or Director. Supporting documentation shall be attached to the travel expense voucher.

B. Expenses for travel between home and office or other non-official purposes.

C. Expenses incurred by an employee while on leave.

#### 5. Mode and Route of Travel

Employees shall use the most practical mode of travel from the standpoint of time and expense. When unusual circumstances preclude adhering to this procedure, Superintendent may allow an exception. Supporting documentation shall be attached to the travel expense voucher.

#### 6. Travel by Public Transportation

Reimbursement for travel by common carrier shall be limited to the lowest cost means of travel unless it is impractical or not available. When for personal reasons a traveler is authorized by the administration to use a private conveyance in lieu of common carrier, reimbursement will be limited to an amount for travel, meals, lodging and miscellaneous expenses equal to the amount which would have been incurred had the travel been by common carrier. Authorized travel time shall be limited to that which would have been allowed had the employee traveled by common carrier. Unless the administration specifically authorized a leave of absence, excess travel time incurred by the authorized use of a private conveyance for personal reasons during working hours shall be charged to the traveler's accrued leave.

Procedure 6-1: All original receipts for travel by common carrier paid by an employer must be attached to the travel expense voucher. This includes the boarding fees at airports which are considered part of the airline ticket expense.

Procedure 6-2: An explanation must be attached to the travel expense voucher when an employee is authorized to use a private conveyance in preference to the common carrier and is claiming an amount equivalent to the common carrier fare. The explanation must include destination, actual departure and return dates and hours which would have been incurred by the use of the common carrier.

#### 7. Use of Privately-Owned Automobile, Aircraft or Other Conveyance

The use of privately-owned automobiles, aircraft or other conveyances may be authorized whenever it is more practical or beneficial to the district's mission than transportation by common carrier or district vehicles. Privately-owned conveyances shall be covered by public liability and property damage insurance, pursuant to Idaho Code.

The cost of transportation by private conveyance shall be paid at the rate set by the Idaho State Board of Examiners, pursuant to Appendix A, up to the maximum allowed by law.

Allowable in-state mileage shall be computed according to the latest official state highway map or mileage charts. Allowable out-of-state mileage shall be computed according to the latest Rand McNally Atlas. Odometer readings are permissible only when mileage computations cannot be made from such maps or charts.

Travel for official purposes in and about a city, including travel within an employee's official station, as defined in 11, when not constituting a trip between two communities may be consolidated on a daily basis and reported as "vicinity travel."

Automobile storage or parking fees will be an allowable expense when necessary to protect state or private property, or for other reasons if advantageous for the District.

Receipts for storage or long term parking fees must be attached to the travel expense voucher for reimbursement.

#### 8. Vehicle Rentals

Automobile rental may be authorized by the administrator when the use of such conveyance is the most economical and practical means of transportation, necessary to accomplish the District's mission.

The most economical and practical rental equipment available will be used. Receipts for vehicle rental costs paid by the traveler must be attached to the travel expense voucher for reimbursement.

#### 9. Use of District Vehicles

The use of district vehicles for personal or other non-official business is strictly prohibited. Home-to-office driving is only permissible when beginning or ending an authorized trip outside of regular business hours, or for other reasons considered in the best interest of the district and approved by the administrator.

State and local traffic laws must be observed at all times. Any employee committing an infraction of such laws shall be personally liable for any damage if the employee is acting outside the course and scope of official duty, and may be subject to disciplinary action. Any employee committing an infraction of such laws may be requested to attend a defensive driving course. Employees shall be personally liable for any fines arising from infractions of state and local traffic laws. District vehicles may be operated only by individuals who possess a valid operator's license. Seat belts must be worn at all times while operating or riding in district vehicles.

## 10. Lodging Expenses

The actual cost of lodging plus applicable tax will be reimbursed to the traveler. Lodging costs may be direct-billed to the district with prior approval of the Business Manager. Lodging costs within an employee's official station (defined in 11.) are not allowable.

Procedure 10-1: Original receipts for all lodging must be attached to the travel expense voucher for reimbursement. Any exception to this procedure must have supporting documentation attached to the travel expense voucher.

Procedure 10-2: At the time of making reservations or registering, employees shall identify themselves as district employees and whenever possible, secure the accommodations at the government rate, if available.

## 11. Meal Expenses Not Allowable

Expenses for meals or lodging of employees at their official station shall not be allowed except as provided below.

"Official station" is defined as the work area or office assigned to the employee or in certain circumstances the Superintendent may further define the "official station" of employees with unique work assignments or responsibilities.

An exception may be made when the Superintendent determines that due to unusual circumstances it is in the best interest of the district that the employee not return home each night, or these expenses are prepaid as part of a registration for a conference, or when the employee's job description requires that employee to be on call for emergencies during meal time.

A. Any potential determination as to what comprises a "conference" or "convention" at the official station must meet certain criteria before any consideration of meals reimbursement will be made. Such criteria may include one or more of the following: (1) the function has participants from various locations; (2) a registration fee is charged; (3) it has a published agenda; (4) meal cost is included in the registration fee; (5) attendance is compulsory or voluntary as determined by the administration, etc.

Meal expense shall not be reimbursed when a clear distinction cannot be made supporting what constitutes an official "conference" and/or "convention" using the criteria cited in 11.1 herein.

B. Reimbursement for meals at the home station is not allowable for informal meetings (i.e. over a casual breakfast, lunch or dinner) between staff members.

The business office will interpret all meetings to be informal unless documented proof is submitted with the travel expense voucher showing otherwise. All meals qualifying for reimbursement will be paid only to the extent authorized by Idaho Code 67-2008.

C. Reimbursement will not be made to an employee for expense of meals or lodging provided by relatives or other parties unless the relative or other party is in the business of providing such services and advertises such to the general public.

D. Reimbursement will not be made to an employee for meal expenses when the employee left their home station earlier than reasonably necessary to meet an airport's recommended pre-departure time.

## 12. Meal Expenses Allowable

### A. Per Diem Reimbursement

A per diem reimbursement shall be paid to the traveler in accordance with the amounts set by the Board pursuant to Appendix B, up to the maximum allowed by policy, for all official travel which mandates an overnight stay. Per diem is defined as the reimbursement for: meals, meal gratuities and fees and tips given to porters, baggage carriers, bellhops, hotel maids, stewards or stewardess on ships, and hotel servants in foreign countries.

Complimentary meals, including continental breakfast provided by a hotel and meals provided by common carriers will be deducted from the per diem allowance to be paid.

### B. Partial Day Reimbursement

Where employees are absent from their official station for less than twenty-four (24) hours, a partial day reimbursement for meals, including gratuity, shall be paid to the traveler at the maximum rate set by the Board pursuant to Appendix B.

For travel involving an overnight stay a partial day reimbursement for per diem shall be paid to the traveler at the maximum rate set by the Board pursuant to Appendix B, within the following limitations:

Breakfast: If the actual departure time is 7:00 am or before, or if the return is 8:00 am or after.

Lunch: If the actual departure time is 11:00 am or before, or if the return time is 2:00 pm or after.

Dinner: If the actual departure time is 5:00 pm or before, or if the return time is 7:00 pm or after.

If meals are furnished as part of a conference registration fee, the employee shall be reimbursed for meals not provided at the partial day meal reimbursement rate, pursuant to Appendix B.

Procedure 12-1: The destination, time and date of departure and return to official station must be shown on the travel expense voucher for each trip.

### 13. Miscellaneous Expenses

With supporting documentation, expenses for certain miscellaneous items are reimbursable if incurred by an employee in the official conduct of district business. Necessary miscellaneous expenses, for which receipts may not be available, may be reimbursed upon certification by the employee.

A. Taxi or bus fares to and from depots, airports and hotels, and other ground transportation costs necessary to conduct official district business while in authorized travel status.

B. Telephone calls and telegraph messages. In the case of a family emergency or unusual circumstance, personal calls may be approved by the Business Manager.

C. All business-related expenses including stenographic or typing and facsimile services, stationery, postage, or other supplies if such were necessary for the transaction of district business.

D. Customary fees for cashiers' checks, bank drafts, or money orders for the purpose of making a remittance to the district.

E. Registration fees which are required as admittance or attendance fees for official participation in conferences, conventions or other meetings.

F. Expenses not specifically described in these policies and procedures as an allowable expense, but which nevertheless, are necessary in the performance of official district business.

### 14. Leave During Travel Status

A traveler who has been granted leave, either compensable or non-compensable, while in travel status shall report in his claim for reimbursement the exact date and time of departure from duty and return.

### 15. Internal Auditing of Travel Expense Vouchers

The business department shall provide a procedure for auditing of all claims for travel expenses for compliance with the standards established by these policies and procedures.

It is the responsibility of the business department to audit all expense vouchers thoroughly to ensure their completeness, correctness and fiscal integrity. All claims shall be presented in a legible manner. Audit procedures should include verification of the following items:

- A. Travel duration does not exceed the trip requirements.
- B. Expenses are not claimed by employees in leave status.
- C. Vicinity travel is reasonable considering work assignments.
- D. Trip mileage corresponds to official state highway maps and mileage charts.

