

## **Expense Reimbursement**

District travel procedures are applicable regardless of what agency eventually absorbs the costs.

### **Travel Approval Authority for Out-of-District Travel**

1. Individual Travel

All reimbursable individual travel must have prior approval of the immediate supervisor/principal and/or the superintendent for out-of-state travel.

2. Group Travel

One travel request form may be used by a group traveling together as long as reimbursements are payable to one individual. That individual has complete responsibility for reporting expenses. Approval procedures are the same as noted above.

### **Lodging and Meals**

Expenses will be reimbursed on either a per diem or actual expense basis, whichever is less. In either case, reimbursements must be submitted with detailed original receipts.

1. Lodging – The per diem for lodging is as follows:

- a. Authorized employee only;
- b. If attending a conference, then the single occupancy conference rate will apply;
- c. If lodging is not covered by a conference, then the following maximum rates apply:

(1) In-State

- (a) Central, Eastern and Southern Oregon – \$150 per night
- (b) Eugene/Salem – \$175 per night
- (c) All other areas in Oregon – \$150 per night

(2) Out-of-State

- (a) Larger Cities ( i.e., Los Angeles, San Francisco) – \$200 per night
- (b) New York – \$250 per night
- (c) Other areas of New York State – \$175 per night

(3) Other

All other areas, please contact the fiscal services coordinator.

2. Meals

The per diem “cap” for meals is \$56 per day.

All food receipts must be itemized with the names of the people covered by the receipt. Reimbursement will be made for ordinary and necessary meal expenses incurred in the course of approved district business. Meals include amounts spent for food, beverage, taxes and related gratuities. **The district will not reimburse for any alcoholic beverages.** Amounts requested over the daily limit must be approved by the superintendent and shall not exceed \$76 per day.

**Travel by Personal Vehicle**

1. Employees may occasionally find it necessary to use their private vehicles while on district business.
2. Each employee is personally responsible for transportation costs once per day from home, to place of work and home again, and/or per association contract, and/or BOLI regulations.

Mileage reimbursement may be provided for other pre-approved out-of-district travel to cover activities which are a part of the employee’s assigned/approved responsibilities.

3. Reimbursement rate per mile covers all costs of operating a vehicle. Additional operating expenses cannot be claimed.
4. Travel in a personal vehicle will be reimbursed at the current IRS rate.
5. If a route other than the shortest one is taken, an explanation must be made.
6. Reimbursement for use of personal vehicle will only be made if it is less expensive than other forms of travel (i.e., plane or train). If an employee chooses to drive their personal vehicle as opposed to a less expensive means of transportation, reimbursement will be at the lesser amount.

**Insurance Coverage**

1. It is the responsibility of the owner or driver of the vehicle to be certain that the private vehicle is adequately covered by insurance. The employee will sign a statement, prior to travel, that absolves the district of liability for the failure to have the necessary insurance coverage.
2. The responsibility of the district and its employees for damages resulting from automobile accidents is not the same as set forth in the district’s general liability insurance policy. The insurance coverage available to the employee is primary to protect both the district and the employee, but only while the vehicle is being used on behalf of the district. As a policy matter, all persons operating their private vehicles on behalf of the district must carry personal liability and property damage insurance in the amounts set forth below:

- a. District employees driving personal vehicles for district-authorized purposes are required to carry, at a minimum, the insurance coverage's listed below:

(1) Personal Liability	\$100,000 per person/\$300,000 per accident
(2) Property Damage	\$5,000 per accident
(3) Uninsured Motorist	\$50,000 per accident
(4) Personal Injury Liability	\$50,000 per accident

### **Accidents Involving Private Vehicles**

Should employees become involved in an accident while using their personal vehicles on district business, local police or state police should be notified as provided by law. The business office should also be notified immediately. In all cases, the individual's personal insurance is considered primary.

### **Combining Official and Vacation Travel**

The following applies to employees who wish to take vacation or other personal leave while on official travel:

1. All time away from work caused by traveling an indirect route must be charged to vacation or other appropriate leave, unless otherwise pre-approved by the immediate supervisor and/or the superintendent;
2. If employees travel for vacation purposes, to any point they would not have visited for business, they must pay the difference in transportation costs;
3. All local transportation (i.e., taxi, carfare, etc.) while on vacation status is paid by the employee;
4. The employee need not pay any of the basic district-approved transportation costs, even though he/she spends a substantial part of the total time away from the district on an approved vacation, provided he/she was directed/authorized in advance by the district to make the business trip. An employee who decides on his/her own to pursue district business while on vacation cannot then use this as justification to have the district pay the basic transportation cost from the district to the location visited.

### **Use of Rental Cars**

1. Rental vehicles should be used only when their use will effect a savings or otherwise be more advantageous to the district, or when the use of other transportation is not feasible.
2. Rental of a compact vehicle is recommended when suitable for district business.
3. Rental vehicles should be used only for official travel. Any additional costs incurred for other usage will be the personal responsibility of the traveler.

**Proof of Vehicle Liability Insurance**  
(For Volunteers and Staff)

Dear \_\_\_\_\_,

You have agreed to use your personal vehicle for district-related business to a field-trip function or for some other school-approved purpose. Please be aware that in the event of an accident, your insurance will provide primary coverage. In order to use your vehicle in this manner, you are required to provide proof of insurance to your supervisor and the business office. Your insurance must meet or exceed the minimum requirements as established by the state of Oregon and as set by the district.

Please **complete** the following information by providing the information requested. **Sign** where indicated and **return** to the school office four working days **prior to the date of the event**.

Insurance Company Name: \_\_\_\_\_  
(not the Agent's Name)

Expiration Date: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Policy Limits: \_\_\_\_\_

Current minimum limits are:

Personal Liability	\$100,000 per person/\$300,000 per accident
Property Damage	\$5,000 per accident
Uninsured Motorist	\$50,000 per accident
Personal Injury Liability	\$50,000 per accident

Date of Birth: \_\_\_\_\_ Oregon Driver License: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Staff/Volunteer Name (as it appears on your driver license): \_\_\_\_\_

Address: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Return form to fiscal services coordinator. If you do not have required coverage, you will not be allowed to use your vehicle in this manner. (Insurance companies may increase coverage for specific dates.)