

# McMinnville School District #40

Code: DLC-AR  
Revised/Reviewed: 11/13  
Orig. Code: DLC-AR

## Expense Reimbursements -- Travel Procedures

The following regulations establish the conditions and procedures for authorization and reimbursement for out-of-pocket expenses incurred by district personnel and officials while traveling on authorized district business.

### In-District Travel by Personal Automobile

1. Approval Requirements
  - a. Employees are responsible for commuting between their personal residence and their assigned work site each duty day. In-District travel is provided when an employee is assigned to travel between two or more different buildings in a single day. At the time of the assignment the employee will be approved for a specified number of trips per day.
  - b. In-District travel is subject to authorization and periodic review of the immediate supervisor.
2. Reimbursement Procedures
  - a. When a personal automobile is used, reimbursement shall be at the current rate per mile authorized by the Internal Revenue Service. To receive reimbursement, employees are required to submit to their immediate supervisor a MSD mileage reimbursement form listing by date the destination, purpose and miles traveled. A standard mileage chart for travel between District buildings is provided on the back of this form.
  - b. Reimbursement rate per mile covers all costs of operating a car. Additional operating expenses cannot be claimed. Insurance costs are included as part of the mileage reimbursement rate. It is the responsibility of the owner or driver of the car to be certain that the car is covered by insurance. If an employee is involved in an accident while on approved District business and using their own personal vehicle, they should notify their personal auto insurance carrier as required under the conditions of their individual policies.

### Out-of-District Travel

1. Definitions:
  - a. Travel expenses include transportation, meals and lodging and other reimbursable travel expenses.
  - b. Federal Per Diem Rates – includes separate rates for lodging and for meals and incidental expenses (M&IE). Per diem rates are published on U.S. General Service Administration website at [www.gsa.gov](http://www.gsa.gov).
  - c. Meals and incidental expenses – includes meals, tips and fees for food and luggage-handling services.
  - d. Transportation expenses – include airfare, train, bus, shuttle, taxi fares, mileage expense, tolls and parking fees.

- e. Lodging expenses – include the cost for hotel, motel or similar establishment for authorized overnight travel. Employees or school officials will not receive any reimbursement in lieu of lodging for staying with a family or friend.
- f. Other reimbursable travel expenses include faxes, telephone, copy charges, room taxes, energy surcharges.
- g. Non reimbursable personal expenses are expenses incurred while traveling that are of a personal nature such as: laundry, personal grooming supplies, entertainment, alcoholic beverages and personal telephone calls.

## 2. Approval Requirements

- a. All out-of-district travel within Oregon and Washington must be approved by the immediate supervisor. Pre-approval is required before registering for a workshop/conference and making traveling arrangements. Employees are required to submit a Workshop/Conference Leave Request Form to their immediate supervisor.
- b. All travel outside of Oregon and Washington must be also approved by the superintendent.

## 3. Reimbursement Procedures

Pre-approval is required before registering for a workshop/conference and making traveling arrangements. Employees are required to submit a Workshop/Conference Leave Request Form to their immediate supervisor. Requests must be submitted with adequate notice in order to receive early registration discounts and provide time for district personnel to make reservations with adequate lead time.

## 4. Transportation

- a. The mode of transportation shall be selected on the basis of minimizing the cost to MSD. If an employee or school official chooses an alternative travel method that is more expensive or adds travel costs to combine personal (vacation) travel with business, the district will only pay the cost of the most economical option.
- b. Airfare will be booked at the economy class rate. All airfare will be arranged by the District Office travel coordinator unless otherwise approved by the superintendent. Employees are not allowed to book airfare on their personal credit cards that provide cash reward points or air miles. Airfare pre-approved to be arranged by other than the District Travel Coordinator will be limited to reimbursement at the economy rate class.
- c. Car rental is strongly discouraged and will only be authorized if other more cost effective means are not available (e.g. shuttles, taxis, etc.).

## 5. Lodging

- a. Expenditures for lodging is authorized for attendance at approved conference and other approved out-of-district business trips when daily travel to and from the employee's personal residence is inappropriate.
- b. Lodging will be reimbursed at the lessor of the single occupancy rate or the federal per diem rate. In addition, room tax and energy surcharges will be reimbursed. If two employees are sharing a room or if all single occupancy rooms are taken, a double occupancy room may be substituted.
- c. Lodging receipts are required to be submitted with your Travel Expense Voucher.

6. Meals and Incidental Expenses

- a. Per diem allowance for meals while traveling overnight on approved business will be reimbursed to employees using the current federal per diem rates for the city in which the employee spends the night.
- b. If a meal is included in the conference registration fee or is paid for separately, the corresponding meal allowance shall be deducted from the daily per diem allowance.
- c. The employee is required to complete and sign the travel expense voucher documenting dates and times of travel in order to be reimbursed for per diem meals and incidentals. No receipts for meals are required to be submitted when reimbursed per diem.
- d. For both the day travel begins and the day travel ends, the per diem meal allowance is to be prorated by at least  $\frac{3}{4}$  of the per diem allowance for each of those days.

7. Travel Expense Reimbursement Form

All claims for overnight travel reimbursement must be submitted on the District Travel Expense Reimbursement Form. Receipts are required for lodging and conference registration fees and travel expenses such as taxis and parking fees. Receipts are not required for per diem meal allowance or for tolls and fees under \$5.00.

8. Travel Advance

The District intends to meet the objectives of conference/workshop attendance in the manner least disruptive to the District representative attending. The Finance Director is authorized to provide advance travel expense payment, where appropriate, for out-of-district travel when expected expenses exceed \$100. Following the event, the attendee will submit a completed travel expense reimbursement form with appropriate receipts attached and either receive any balance due or return any unused balance of the advance. Requests for advance should be submitted two weeks prior to travel.

9. Proof of Attendance

A certificate of completion or proof of attendance at a workshop/conference is required to be submitted to accounting once it is received. If proof of attendance cannot be verified, the District may request repayment of all travel cost and reimbursements to employee.

10. Reports

Employees returning from approved travel to conferences, continuing education, training, seminars etc. may be asked to report back to their immediate supervisor on the results and benefits of the trip. This report may be oral or written at the discretion of the supervisor.