

Travel Expenses

Procedure 6213P

GENERAL PROVISIONS

- A. **Approval of Travel:** All travel and reimbursement requests must be approved by the employee's supervisor.
- B. **Documentation:** All travel and reimbursement requests must be accompanied by documentation supporting the validity and public purpose for the costs incurred. This may include conference agendas, registration forms, or other supporting documents which show the dates/times of the events. Original itemized receipts for reimbursable costs must be attached to the reimbursement request. Receipts must demonstrate that costs have been paid by the employee in order to be valid. Receipts for allowable per diem meal costs will not need to be turned in.
- C. **Advance Travel:** For out-of-state travel, reimbursement of expenses is allowed for one travel day preceding a conference and for one travel day following the conference, providing a reasonable return flight time is not available the day the conference ends. If an exception to the rule for out-of-state travel reimbursement is to be considered, the employee must clearly show cost savings as a result of arriving at the destination earlier or leaving the conference site later than one day before or after the conference dates.
- D. **Direct Route:** Travel must be by the most direct route possible. Any employee traveling by an indirect route must assume any additional expenses incurred.
- E. **Costs Paid by Outside Agencies:** When an employee's travel expenses are to be reimbursed by an outside entity, the Kelso School District's travel policy and procedures shall apply. The Business Office shall be notified before travel occurs. An employee is not allowed to receive reimbursement for similar charges from both an outside agency and the district for travel expenses.
- F. **Timeline for Submittal of Claims for Reimbursement:** All travel reimbursement claims shall be submitted within 5 days following completion of travel. Travel reimbursement claims not received within 5 days may be subject to denial.
- G. **Combined Business and Personal Time:** When combining business and personal time on a trip, employees shall be responsible for arranging personal travel and accommodations and any costs incurred for personal reasons. Employees shall maintain accurate and detailed records to distinguish personal expense from district expense. Prior approval from supervisor is required before travel occurs.
- H. **Carpooling and Rental Vehicles:** Employees should always carpool and look for hotel shuttles or taxis as opposed to renting a vehicle. If renting a vehicle is necessary during travel, prior approval from the Business Office and supervisor is required.
- I. **Canceled or Shortened Travel:** Employees who must cancel or shorten their travel for any reason shall communicate with their supervisor immediately. Employees may be responsible for the reimbursement of expenses incurred by the district.

REIMBURSABLE EXPENSES

Meals	Federal GSA per diem rate	
Lodging	Federal GSA daily lodging rate	Itemized receipt required
Airline, Train, Bus Fare	Coach or economy rate	Itemized receipt required
Taxi, Parking, Toll	Actual cost	Itemized receipt required
Mileage - Personal Vehicle	IRS mileage rate	

- A. **Meals:** Individual receipts are required from each employee who obtains reimbursement from the district, unless an employee's travel puts them into overnight travel status.
 - a. **Overnight Travel:** Employees on overnight travel status for school district business or attending conferences will be awarded per diem meal rates.
 - i. Per Diem meal rates will be based on published Federal GSA per diem rates.
 - ii. Reimbursement for meal expense will not be authorized when an employee does not incur expense for meals because they are furnished, either by the host facility or as part of the registration or lodging. An exception to this would be if the meal option consists of a continental style breakfast.
 - iii. The per diem allowance will be reduced for meals provided as a part of a conference based upon the per diem value of the meal under GSA guidelines.
 - iv. Meals may be reimbursed on a receipt basis, provided the amounts of the receipt do not exceed the per diem rate.
 - b. **Taxable Meals:** If an employee's travel is not overnight, reimbursements for meal expenses are considered taxable benefits.
 - i. A Taxable Meal Claim form shall be submitted within 5 days of return from travel.
 - ii. Reimbursement amount for meals shall not exceed the Federal GSA per diem rate.
 - iii. Taxable meal reimbursements shall be included in an employee's payroll check.
- B. **Motel and Hotel Expenses:** Individual receipts are required from each employee who obtains reimbursement from the district.
 - a. **For overnight conference travel:**
 - i. Reduced conference rates for lodging shall be utilized when made available by a conference hotel site.
 - ii. Lodging rates that exceed the Federal GSA rate will need pre-approval from the Business Office.
 - b. **For other overnight travel:**
 - i. Lodging costs shall follow the Federal GSA Daily Lodging Rate. Lodging rates that exceed the Federal GSA rate will need pre-approval from the Business Office.
- C. **Airline Tickets:** Individual receipts are required from each employee who obtains reimbursement from the district.
 - a. The employee will be reimbursed for economy based seating based upon actual costs incurred, unless approved by the Superintendent or designee.
 - b. Costs incurred for cancellations and rebooking of flights as a result of non-district circumstances will be the responsibility of the employee and not be reimbursed.
- D. **Taxi, Uber, Lyft, Parking:** Individual receipts are required for each employee who obtains reimbursement from the district.
 - a. Taxi, Uber, Lyft shall only be reimbursed when travel occurs between airport and hotel, airport and conference or meeting site, and hotel and conference or meeting site.
 - b. Taxi, Uber, Lyft receipts must include location of pickup and drop off.
 - c. Taxi, Uber, Lyft tips shall not exceed 15% to 20% of total fare amount.
 - d. Parking for airline travel shall only be reimbursed up to the daily rate of long-term garage parking.
 - e. Taxi, Uber, Lyft trips for the purpose of meals require approval from supervisor.

- f. Employees shall carpool to reduce cost to the district.
- E. **Mileage - Personal Car:** Mileage reimbursement shall be at the IRS Rate.
 - a. **Inside the District:**
 - i. Reimbursement is allowed when approved in advance by the employee's supervisor.
 - ii. When travel is a necessary part of performing one's work, the employee may receive blanket approval for the year.
 - iii. Mileage amounts determined by the Kelso School District Mileage Chart.
 - b. **Outside the District:**
 - i. Reimbursement allowed only in connection with an approved travel request.
 - ii. Reimbursement will be based on the most direct route possible.
 - iii. Reimbursable mileage shall be based on departure from assigned work location, unless pre-approved by the Business Office. The District does not reimburse for employee commutes.
 - iv. Printed documentation indicating exact mileage of travel using an online trip/mileage site, such as MapQuest, is required for reimbursement from the district.

TRAVEL ADVANCES

- A. A written request for a travel advance must be submitted to the Business Office within 15 days of travel.
- B. Travel advances are paid in the form of a check payable to the employee.
- C. Reimbursable expenses incurred while on district business must be submitted to the Business Office within 5 days following completion of the travel.
- D. If an employee must cancel or shorten their travel after a travel advance was provided, the employee shall reimburse the district for the difference in actual incurred expenses. Reimbursement to the district shall be paid within 5 days following completion of travel.
- E. Travel advances shall not be issued for payment of airline tickets or pre-registration fees.

NON-REIMBURSABLE EXPENSES

The following expenses are not reimbursable:

- A. Alcoholic beverages, meals, or snacks other than regular meals
- B. Mileage to and from home.
- C. Mileage for school levy promotions and other nonofficial school functions.
- D. Entertainment.
- E. Expenses for travel extending beyond the time required for the meeting or business, unless it is in the District's financial interest to extend the travel over a Saturday night or such other rate advantages.
- F. Expenses incurred by non-employees traveling with the staff member, including room surcharges.
- G. Transportation to and from a hotel or conference to get meals, unless approved by supervisor.
- H. Transportation between a hotel and conference location unless the hotel or conference does not provide a shuttle AND the distance between the two locations is greater than 1 mile, unless approved by the supervisor.

- I. Transportation for participation in non-conference-related activities.
- J. Rentable means of transportation; i.e. bicycles, scooters, etc.

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