

4.10 Employee Travel Policy

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This policy provides guidelines for the identification and reimbursement of approved business travel expenses (excluding day field trips), and instructions for processing related expense forms.

Oregon School District reimburses for expenses that are reasonably necessary and incurred in the performance of authorized business, provided they are itemized, fully explained, and approved on a Travel Expense Reimbursement form (TER). TER Forms must be approved and signed by your supervisor. It is each employee's responsibility to adhere to this policy when involved in any expenditures on behalf of the school district. It is the responsibility of the immediate supervisor or designee approving the TER form to be familiar with the need for the expenditures and to be satisfied that they are in compliance with this policy.

Questions regarding this policy should be directed to the Business Service Office.

4.10.01 Credit Card Use

Oregon School District Credit Cards are to be used for reimbursable business expenses only.

4.10.02 Air Transportation

4.10.02A Reservations

Each reservation will be evaluated for low fare alternatives and savings. The lowest fare possible should be chosen even if it involves a connecting flight compared to a direct or nonstop flight. Exceptions to the lowest fare can be made if a connecting flight does not save at least \$150.00, or adds more than 1 1/2 hours travel time.

4.10.02B Advance Booking

Advance planning is crucial in obtaining the lowest airfare. Whenever possible, travel arrangements should be made at least 14-21 days in advance. Cancellation/rescheduling fees are minimal.

4.10.02C Weekend Stay-Overs

In some instances, airfare expense may be dramatically reduced with a stay overnight on a Friday or Saturday. Friday or Saturday stays are encouraged as long as the airfare savings surpass additional expenses.

4.10.02D Group Fares

If more than 10 people will be flying to a specific meeting or training session, a group fare should be explored.

4.10.02E Charter Flights

Charter flights can be used when the cost is less than a commercial airline.

4.10.02F Frequent Flyer Programs

The employee may retain any frequent flyer benefits offered by airlines. However, at no time should a cost-efficient travel plan be altered to receive these benefits.

- 4.10.03 Lodging
Room rental costs for every day that lodging away from home is required for business reasons is reimbursable. Standard single rooms at reasonably priced quality hotels or motels are to be used. Bills must be submitted for reimbursement.
 - 4.10.03A Cancellations
If accommodations are not required as planned, cancellations should be made as soon as possible to avoid "no show" charges.
 - 4.10.03B Lodging with Family
If a family member travels with the employee, an adjustment must be made on the TER Form between a single rate and a double rate room. The employee will be reimbursed for a single rate room.
 - 4.10.03C Laundry Service
Laundry expenses will be reimbursed if the trip lasts more than five days or an unusual situation such as lost luggage or having clothes soiled in a rainstorm occurs.
- 4.10.04 Car Rental
Cars should be rented only when it is more economical than using an airport limousine, motel/hotel complimentary shuttle service, or taxi.
 - 4.10.04A Car Size
A compact or a mid-size car should be chosen if the employee is traveling alone, or a mid-size or full-size car if traveling with others. Mini-vans may be rented if a large group of people are traveling together. Luxury cars will not be reimbursed.
 - 4.10.04B Refueling
Whenever possible, rental cars should be returned to the rental agency with a full tank of gas to avoid high refueling charges by the rental company.
 - 4.10.04C Traffic Violations
Tickets for traffic violations (speeding, parking, etc.) while driving a rental car for business purposes are not reimbursable.
 - 4.10.04D Insurance
Cars rented in the Oregon School District's name are insured for damage which may occur during use for business purposes. The first insured is the employee if rented in the employee's name and second insured is the Oregon School District. Purchase of additional car rental insurance offered by the car rental agency, is to be paid by the employee.
 - 4.10.04E Accidents

If involved in an accident while driving a rental car, the employee should immediately call the Business Office at 835-4033. The rental agency should also be called for instructions. Always make sure that a police report is filed, unless there is only very minor damage.

- 4.10.05 Personal Cars
Use of personal vehicles in connection with school district business will be reimbursed at the current IRS mileage allowance. For trips more than 150 miles, it may be less expensive to rent a car.
- 4.10.05A Traffic Violations
Tickets for traffic violations (speeding, parking, etc.) while driving your car for business purposes are not reimbursable.
- 4.10.05B Accidents
If involved in an accident while driving a personal car on school district business, the employee should immediately call the Business Office at 835-4033. A police report is to be filed, unless there is only minor damage. The employee will be reimbursed for comprehensive coverage deductibles up to \$500.00 and collision coverage deductibles up to \$1000.00. Deductibles below these maximums will be reimbursed at the stated level in the employee's automobile insurance policy. Submit reimbursement for these deductibles on a TER form.
- 4.10.05C Cars in Lieu of Flying
If the employee/traveler chooses to drive a personal automobile instead of flying, the traveler will be reimbursed for actual mileage up to a maximum of the cost of a round trip coach airfare to that location. Unless there is a business need, the traveler will not be reimbursed for in-transit lodging or meal expenses.
- 4.10.06 Train
Transportation by train should be listed in the "Transportation-Other Modes" column of the TER form. Receipts for train transportation must be attached to the TER form to obtain reimbursement when the total is more than \$25.00.
- 4.10.07 Taxis and Buses
The cost of taxis, limousines, or bus fare to and from places of business, hotels, airports, etc. is reimbursable when used for school business purposes. Tips should be reported as part of the cost of such transportation and not as a separate item.
- 4.10.08 Meals/Alcohol
The amount spent for meals should be reasonable. Variance in the cost of meals in different parts of the country is expected. Expenses for alcoholic beverages are not reimbursable.
- 4.10.09 Tips
Tips for meals, refreshments or for taxi transportation should be included as part of the particular expense; all other tips should be shown as separate items. Tips should be limited to 15%.

- 4.10.10 Telephone
Business telephone calls are reimbursable through the use of a TER form. Travelers on school business, may call home at the school district's expense.
- 4.10.11 Travel and Accident Insurance
Oregon School District carries travel and accident insurance on all employees traveling on business. Additional travel insurance, if desired, is to be the responsibility of the employee.
- 4.10.12 Schools
Certain expenses incurred by employees attending schools, seminars or universities may be reimbursable. To claim reimbursement for such expenses, you must obtain approval from your immediate supervisor prior to attending a particular school, seminar or university. Expenses related to attendance at these schools or seminars are charged to the appropriate site or department.
- 4.10.13 Recordkeeping
All travel and entertainment expenses are to be submitted on a TER form and should be filed within 30 days of incurring the expense. Completed forms should be submitted to your immediate supervisor or designee for approval, then sent to the Accounts Payable Department.
- An expense of any kind, other than mileage, which exceeds \$10.00, must be supported by an appropriate receipt.
- 4.10.14 Exceptions
It is recognized that, under certain circumstances, exceptions to the TER Policy can and will be made. Because this policy provides general guidelines for use, it is expected that the necessity for exceptions will be very important. Exceptions will be granted only with the written approval on the TER form by the Business Manager or Superintendent.

Adopted: October 25, 1999