

Out-of-Town Travel Regulations

Standard Travel Allowance Schedule

Reimbursable travel expenses include only those incurred while traveling in connection with official District business. Departure and return times are normally considered to be when an employee leaves and returns to his/her headquarters.

Travel expense allowances payable to District employees on official travel status are governed by the Internal Revenue Service mileage rate and the state-approved per diem.

Travel Allowances B Transportation – Employees must first check for availability of a District vehicle for any out-of-town travel. (See Board Policy #8121)

A. Standard Personal Vehicle Rates

1. An employee traveling in- or out-of-state, as approved by the administration and/or the Board, may claim reimbursement at the Internal Revenue Service rate per mile.

B. Public Conveyance Rates

1. An employee traveling in or out of state, as approved by the administration and/or the Board, may claim reimbursement at actual cost of public conveyance rate, as approved.
2. Out-of-state travel must be approved at least one (1) month prior to travel.

C. Direct Route Mileage

1. All employees requesting reimbursement for mileage under any mode of transportation will be reimbursed according to the State mileage chart. (See the Montana Mileage Chart on page 5.)

Travel Allowances B Meals

- A. Meal allowances are not dependent on actual out-of-pocket expenses, nor is a receipt required to obtain reimbursement. Meal allowances will be paid at State rates.

- B. Criteria for Meal Allowance
 - 1. In order for travel meal reimbursements to be excludable from wages, employees must be traveling away from their tax home on their employer's business. In general, 'traveling away from tax home' means:
 - a. a. The employee must remain outside Fergus County substantially longer than an ordinary day's work, and
 - b. b. The employee needs to obtain substantial sleep or rest to meet the demands of the work while away from home.

Meal allowance payments that do not meet these criteria will be processed and taxed through payroll.

- 2. An employee who has been approved to travel outside the District may claim meal allowances as stated in the allowance schedule, under the following conditions:
 - a. Morning Meal B if the employee's departure time to leave for a business site is **prior** to 6:00 a.m.
 - b. Midday Meal B if the employee has conducted approved District business during morning hours and is scheduled to continue such business after the midday lunch period, or if the employee is in authorized transit during the entire normal lunch period.
 - c. Evening Meal B if the employee is scheduled to continue District business after 6:00 p.m. (i.e., after the evening meal or the next day), OR if the employee is in authorized transit after 6:00 p.m.

- 3. Any meal provided by the conference in a registration fee (i.e., continental breakfast, lunch, banquet) is not reimbursable under meal expense unless specifically approved.

Travel Allowance B Lodging

- A. Employees will be reimbursed for actual out-of-town out-of-pocket lodging expenses up to the maximum as allowed by State rates.
1. In order to claim lodging reimbursement, a bona fide original copy of a receipt from the lodging facility must be attached to the Travel Reimbursement Claim Form sent to the Business Office.
 2. Whenever possible, two (2) or more employees of the same sex, traveling to the same District business site, should share lodging to decrease District costs, unless prior approval has been obtained from the Superintendent.
 3. Lodging Provided. In some instances lodging may be provided to the employee but no charge directly assessed. In these instances lodging expense cannot be claimed by the employee. Examples are:
 - a. District seminars where lodging is provided Aon campus@;
 - b. Lodging is included in the registration fee.

Travel Allowances B Miscellaneous

- A. Miscellaneous business expenses associated with travel are reimbursable, with appropriate documentation. Examples are:
1. Registration fees;
 2. Banquet fees which replace an approved meal;
 3. Taxi fare or in-town transit vehicle to and from District business sites or lodging sites.
- B. Miscellaneous expense items of Five Dollars (\$5) or more must be supported by paid receipts.
- C. Miscellaneous expenses must be explained in detail on the Travel Reimbursement Claim Form.

Travel Allowances Special In-Lieu

- A. An employee may wish to use other than the most economical and expeditious mode of transportation to complete a travel-oriented work assignment. For example, an employee is required to attend a conference in Seattle. Rather than fly, the employee prefers to drive his/her private vehicle. It is permissible in this case to allow Air Travel Equivalent; that is, the cost of air travel and time. The travel time required above air travel hours would have to be completed on the employee's time (non-working hours or charged against accumulated vacation time).
- B. Applicable claims for expenses are to be clearly marked In-Lieu Allowance and the details fully explained. Reimbursements will be made for the least expensive mode of travel.

General Rules

- A. Travel Time Allowed. It is usually necessary to begin traveling prior to the time established for a meeting appointment, conference, etc., which necessitated the travel. Also, business activities may terminate late in the day, and because of inclement weather, fatigue, unavailability of transportation, etc., it may not be feasible for the employee to promptly return to headquarters. In such cases travel expenses are allowed for a reasonable amount of time preceding and following the actual business activities which necessitated travel. Because circumstances vary, the Reasonable criterion will have to be applied on an individual basis by the Superintendent or the Board.
- B. Frequency of Filing. Every Travel Reimbursement Claim Form must be approved by your administrator and signed by the Superintendent, except for claim forms for the Superintendent, which will be signed by the Business Manager.
- C. Mode of Transportation
 - 1. Employees should travel by the least expensive class of service available within the mode of transportation being utilized. When other than the least expensive class of service is used, a full explanation of the circumstances justifying the necessity of using a more expensive class of service must be included with the travel request.
 - 2. When more than one (1) employee is approved to travel to the same District business site by personal vehicle, mileage reimbursement will be allowed for only as many vehicles as judged Reasonable to safely carry the number of employees.

Policy History:

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