



Cache County School District

Policy Series 6000: Finance and Operations

Policy No. 6350 P1

Employee Travel Procedures

This procedure establishes requirements for the authorization, payment, and reimbursement of reasonable and necessary expenses incurred by employees while conducting official district business.

District travel should be undertaken only when it serves a legitimate district purpose, provides a reasonable benefit to the district, and represents an appropriate use of public funds. Employees are expected to exercise reasonable economy and the same care in incurring travel expenses that a prudent person would exercise when traveling at personal expense.

Travel Authorization

- 1) All employee travel must be authorized in advance by the appropriate administrator and must serve a legitimate district business or professional purpose.
- 2) Approval of travel should consider:
 - a) the purpose and anticipated benefit of the travel;
 - b) alignment with district, department, school, or employee responsibilities and priorities;
 - c) the total anticipated cost;
 - d) available budget;
 - e) the number of employees attending the same event;
 - f) the impact of the employee's absence on district operations; and
 - g) whether the intended purpose can reasonably be accomplished through a less costly alternative.
- 3) Travel shall be approved as follows:
 - a) In-state travel: Travel within Utah may be authorized by the employee's principal or district director when the travel is within the approved school or department budget.
 - b) Out-of-state travel. Out-of-state travel must be approved in advance by the appropriate district director or supervisor and the superintendent or designee.
 - c) International travel. International employee travel is not permitted.
- 4) Employees shall not make nonrefundable reservations or incur travel expenses until required approval has been obtained.

- 5) Authorization to travel does not authorize every expense incurred during the trip. Payment or reimbursement is limited to reasonable, necessary, and allowable expenses consistent with Policy 6350 and this procedure.
- 6) The district may limit or deny travel based on budget availability, operational needs, the number of employees attending the same event, the anticipated benefit to the district, or the availability of a reasonable lower-cost alternative.

General Reimbursement Requirements

- 1) The district will pay or reimburse reasonable and necessary expenses incurred in connection with authorized district travel.
- 2) Whenever practical, travel expenses should be paid directly by the district rather than personally by the employee and subsequently reimbursed.
- 3) Employees shall use district-designated purchasing, reservation, or State Travel when required by the business office.
- 4) Employees are responsible for obtaining and submitting required receipts and other supporting documentation in accordance with business office procedures.
- 5) Personal expenses are not reimbursable. Examples include:
 - a) entertainment or recreational expenses;
 - b) alcoholic beverages;
 - c) expenses for spouses, family members, or other travel companions;
 - d) optional travel or lodging upgrades;
 - e) personal purchases;
 - f) traffic or parking citations and other fines or penalties; and
 - g) other expenses unrelated to the authorized district purpose.
- 6) Questions regarding the allowability of an anticipated expense should be resolved with the business office before the expense is incurred.

Transportation

- 1) Employees shall use a reasonable and economical means of transportation, considering total cost, travel time, number of travelers, safety, and operational needs.
- 2) District Vehicles:
 - a) when practical and available, employees may be expected to use a district vehicle for authorized travel; and
 - b) only authorized drivers may operate district vehicles.
- 3) Personal Vehicles and Mileage:
 - a) employees authorized to use a personal vehicle for district business will be reimbursed at the federal mileage rate in effect on July 1 of the applicable fiscal year;

- b) Google Maps or a comparable mapping application should be used to document and verify reimbursable mileage when requested;
- c) normal commuting mileage between an employee's residence and regular work location is not reimbursable;
- d) when an employee travels directly from home to a temporary work location, meeting, conference, or other district business destination, reimbursable mileage shall ordinarily be limited to the business mileage that exceeds the employee's normal commute, unless otherwise authorized by the business office; and
- e) when multiple employees travel to the same destination, they are expected to coordinate transportation when practical.

The district may limit mileage reimbursement to the number of vehicles reasonably necessary to transport the group unless separate transportation is justified by scheduling, work assignments, accessibility, or other operational needs.

- 1) Air Travel: Air travel guidelines are defined by the following parameters:
 - a) Air travel shall be purchased through the district-designated or state travel system when required by the business office.
 - b) Employees shall select a reasonable economy-class fare that meets the business requirements of the trip.
 - c) The reasonable cost of necessary baggage may be paid or reimbursed.
 - d) Preferred seating, class upgrades, early boarding, or other optional services are not reimbursable unless necessary for a documented business purpose and approved in advance.
 - e) Necessary change or cancellation fees resulting from district business needs, or circumstances outside the employee's reasonable control, may be reimbursed.
 - f) Receipts or equivalent documentation are required.
- 2) Rental Vehicles and Local Transportation: Local transit guidelines are defined by the following parameters:
 - a) Rental vehicles, public transportation, shuttles, taxis, rideshare services, and similar transportation may be paid for or reimbursed when reasonably necessary to accomplish the business purpose of the trip.
 - b) Employees should select the most economical, reasonable option based on the number of travelers, destination, schedule, and total anticipated cost.
 - c) Rental vehicle upgrades and optional services are not reimbursable unless necessary for the business purpose of the trip and approved in advance.
 - d) Employees shall follow business office guidance regarding rental vehicle insurance and authorized rental providers.
 - e) Only authorized drivers may operate rental vehicles obtained for district business.

- f) Receipts are required for rental vehicles and other local transportation expenses as required by the business office.
- 3) Parking, Tolls, and Related Fees: Fees and penalties are governed by the following parameters:
 - a) Reasonable parking, tolls, and other necessary transportation-related fees incurred in connection with authorized district travel may be reimbursed.
 - b) Traffic citations, parking violations, towing charges resulting from driver misconduct, and other fines or penalties are the employee's responsibility.

Lodging

- 1) Lodging may be authorized when overnight accommodations are reasonably necessary to conduct district business.
- 2) Lodging is ordinarily authorized when an event is more than 125 miles from the Cache County School District Office and:
 - (a) the first required session begins before 8:00 a.m., or
 - (b) the final required session concludes after 8:00 p.m.
- 3) The superintendent, business administrator, or designee may approve lodging in other circumstances when reasonably necessary for safety, operational efficiency, weather conditions, scheduling, or the effective conduct of district business.
- 4) Employees should request the applicable conference, government, or state rate when making lodging reservations.
- 5) For conferences and similar events:
 - (a) employees may stay at the designated conference hotel at the published conference rate, or
 - (b) employees may select alternative lodging at an equal or lower total cost; and
 - (c) the approved conference hotel rate may be reimbursed even when it exceeds the standard federal lodging rate, as long as staying at the conference hotel reasonably supports participation in the event.
- 6) For non-conference travel, lodging will ordinarily be reimbursed up to the applicable federal lodging rate for the location in effect on July 1 of the applicable fiscal year.
- 7) Optional room upgrades, entertainment charges, minibar charges, and other personal expenses are not reimbursable.
- 8) Lodging receipts are required for reimbursement.

Meals and Per Diem

- 1) Employees traveling outside Cache County on authorized district business may receive meal reimbursement using the applicable federal per diem rate adopted by the district.
- 2) The applicable rate shall be based on the travel destination and the federal rate in effect under Business Office procedures.
- 3) Per diem shall be reduced for meals provided as part of:
 - a) conference or registration fees;

- b) lodging;
 - c) another district-paid event or activity; or
 - d) another source when no meal expense is reasonably incurred by the employee.
- 4) First- and last-day travel per diem shall be calculated in accordance with the federal methodology adopted by the district and business office procedures.
- 5) Employees receiving per diem are not required to submit individual meal receipts unless otherwise required by the business office.
- 6) Alcoholic beverages are not reimbursable under any circumstances.

Conference and Registration Expenses

- 1) Employees may be authorized to attend conferences, workshops, conventions, seminars, or other professional learning activities when participation:
 - a) supports the employee's assigned responsibilities;
 - b) advances district, department, or school goals; or
 - c) provides a reasonable professional benefit to the district.
- 2) Reasonable registration fees for approved conferences, workshops, and other professional activities may be paid by the district when authorized in advance.
- 3) When attendance is initiated or sponsored by the district, approved travel, registration, and related expenses may be paid or reimbursed in accordance with this procedure.
- 4) The Utah State Board of Education or a recognized professional organization may sponsor an activity and invite participation from local school districts. The appropriate administrator may authorize participation when the activity is relevant to the employee's responsibilities and advances district goals or practices.
- 5) An employee may request permission to attend a professional conference, workshop, or other activity that primarily supports the employee's individual professional interests. The appropriate administrator may approve the absence subject to applicable district leave policies. Unless specifically approved in advance, the employee shall be responsible for expenses associated with such attendance.

Personal Travel Combined with District Travel

- 1) An employee may combine personal travel with authorized district travel when doing so:
 - a) does not interfere with the district's purpose of the trip;
 - b) does not increase the cost to the district; and
 - c) has been disclosed to and approved by the appropriate administrator in advance.
- 2) The district will pay only those expenses that would have been incurred had the employee traveled solely for the authorized district purpose.
- 4) Any additional airfare, lodging, meals, transportation, parking, rental vehicle, or other costs attributable to the employee's personal portion of the trip are the employee's responsibility.

- 5) Employees may be required to provide documentation to substantiate the cost of the district-only travel itinerary when personal travel affects the travel dates, destinations, or arrangements.
- 6) Personal travel days are subject to applicable district leave requirements.
- 7) Expenses for spouses, family members, or other travel companions are not reimbursable.

Documentation, Reimbursement, and Cancellations

- 1) Employees shall submit reimbursement requests and required supporting documentation within the timelines established by the business office.
- 2) Receipts are required for lodging, airfare, rental vehicles, conference registration, and other expenses when required by this procedure or business office procedures.
- 3) Documentation should clearly establish:
 - a) the business purpose of the expense;
 - b) the amount paid;
 - c) the date of the expense; and
 - d) the vendor or provider, when applicable.
- 2) Employees shall promptly cancel reservations when authorized travel is canceled or changed and shall take reasonable steps to obtain available refunds or credits.
- 3) Refunds or credits resulting from expenses originally paid by the district remain the property of the district.
- 4) Airline, lodging, registration, or other travel credits obtained through district funds shall be used for future district business when permitted by the provider.
- 5) Employees are responsible for promptly notifying the business office of refunds or credits associated with district-paid travel.
- 6) Reimbursement requests that are incomplete or lack required documentation may be returned to the employee or denied until adequate documentation is provided.

Noncompliance

- 1) Expenses that do not comply with Policy 6350, this procedure, or applicable business office requirements:
 - a) may be denied reimbursement;
 - b) may require repayment to the district;
 - c) may be reported as taxable income when required by law or IRS guidance; and
 - d) may result in corrective or disciplinary action consistent with district policy.
- 2) Questions regarding allowable expenditures should be directed to the business office before making a purchase or incurring an expense.

Periodic Review

The business administrator shall periodically review district travel rates, reimbursement practices, and administrative procedures and, as appropriate, recommend revisions to the Superintendent to maintain compliance with applicable law, IRS requirements, federal travel guidance, and district operational needs.

Cross-References

- 1) Policy 6350 — Travel Expenses and Reimbursement
- 2) Federal Mileage Rates
- 3) Federal Per Diem and Lodging Rates
- 4) Applicable district purchasing and purchasing-card procedures

Legal References

- 1) Internal Revenue Service requirements governing accountable plans, business travel expenses, mileage reimbursement, and taxable employee benefits
- 2) Applicable Utah laws and administrative rules governing the expenditure of public funds

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