



Travel Policy and Procedures

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POLICY STATEMENT

In order to best utilize the resources available to the school district, employees are expected to minimize the costs of necessary business travel. This policy sets out regulations and restrictions governing travel expense.

PROCEDURE

Employees will use the most economical means available when traveling at school district expense; will thoroughly document all expenses incurred; and will complete all necessary travel requests and reports according to the following guidelines:

TRAVEL AUTHORIZATION, PROFESSIONAL LEAVE, & TRAVEL EXPENSE STATEMENTS

Travel Authorization Request: All travel requires advanced authorization of the Superintendent or designee (BOE Policy 2.804). A Travel Authorization Request (TAR) form is required for all employees with the exception of the Superintendent, Board of Education members, and Executive Directors. All travel must be approved on a TAR and a completed Purchase Order must be in place before any travel arrangements are made. Employees are not to make their own travel arrangements or pay for any District travel with their personal funds. All pre-travel documents pertaining to reimbursement (completed TAR with Purchase Order) should be signed, approved, and submitted to the Business Office before commencing travel.

Important Note: Conference Agenda Information should be attached to TAR.

Employee Leave: Professional Leave will be entered in Skyward Software by all staff for any days requiring their being out of the office/building.

Travel Expense Reimbursement Requests are required for all overnight travel by staff (including Superintendent, Board of Education members, and Executive Directors).

TRANSPORTATION

PUBLIC TRANSPORTATION

- The School District will pay the actual costs of coach or regular fare for public transportation by air, train or bus. Any upgrades of class (Business or 1st Class), seat selection fees, or boarding preference fees will be the responsibility of the employee and will not be reimbursed. For flights that do not include a checked bag in the price, the School District will pay for one checked bag. Any additional baggage fees will be the responsibility of the employee and will not be reimbursed.

TRANSPORTATION/AUTOMOBILE

- **School District Vehicle:** If a district vehicle is used, the district will pay only the cost of actual expenses for gasoline. If an employee uses a district vehicle for travel, no mileage reimbursement will be issued. If an employee purchases fuel for a district vehicle while on travel, the fuel receipt should be submitted in order for the employee to be reimbursed.
- **Personal Vehicle:** The District will reimburse employees a standard rate for official travel by personal vehicle at the prevailing IRS mileage reimbursement rate based on the actual driving distance by the shortest, most direct route. Employees who use their personal vehicle for travel will be reimbursed only for mileage; they will not be reimbursed for any fuel purchase(s) that are made.
 - Reimbursement shall be based on mileage obtained from internet mileage tools such as MapQuest or Google Maps as well as the ORS Mileage Reimbursement Chart. Attach printed maps and mileage sheets to travel claims for complete documentation when seeking reimbursement.
 - Travel between all District locations shall be reimbursed based on the established ORS Mileage Reimbursement Chart.
 - During a regular workday, travel from an employee's work location to a location outside of the District and back to the work location shall be reimbursed based upon the mileage to and from the work location to the location of the meeting. (e.g. Travel from SAB to Knoxville and back to SAB.)
 - On a regular workday, travel to/from an employee's residence to a location outside of the District shall be reimbursed based on the lesser rate that would be generated from an employee's residence or worksite. (e.g. Travel from residence to early morning meeting in Knoxville. The reimbursable mileage

is the lesser of home to meeting OR office to meeting & return mileage to starting location.)

- Voluntary attendance to any work-related function is not eligible for mileage reimbursement. (e.g. Traveling to football game when not required, attending staff party, visiting HR for personal reasons, etc.)
- If a personal vehicle is used by two or more official travelers on the same trip, only the traveler owning or having custody of the vehicle will be reimbursed for mileage at the rate outlined above.
- Additional travel days required due to automobile travel rather than air travel, when automobile travel is selected as a matter of personal preference, shall be taken as annual leave or other appropriate leave.
- Reimbursement for use of a personal vehicle, meals, and lodging while in transit to and from destination shall not exceed the cost of economy class airfare.
- **Traffic Violations, Fines, and Accidents:** Employees will not be reimbursed for any fines for traffic violations or parking tickets. Costs incurred to personal vehicles due to accidents, or the cost of repairs due to breakdowns of personal vehicles will not be reimbursed to employees.
- **Rental Vehicle:** Employees may choose to use a rental vehicle for school-related travel. Oak Ridge Schools has collaborated with Enterprise Holdings, taking advantage of the State of Tennessee Contract rate for potential additional savings. If a rental vehicle is used, the cost of the rental vehicle will be paid by the district, and the employee will be reimbursed for any fuel purchase(s) that are made based on actual receipts provided.

LODGING

REIMBURSEMENT/PAYMENT

- Lodging will be based upon the locality, purpose for travel, and availability of accommodations. Reasonableness and economy should be exercised by the traveler in all instances. Reasonableness can be compared using GSA lodging rates. Lodging at Conference Hotel will be permitted.
- **Upgrades/Suites/Special Requests:** In the event the employee desires alternative upgrades in lodging, the employee will reimburse the District for the

difference in cost between a standard room rate and the upgrade/special request. The amount to be reimbursed by the employee will be limited to the difference in the room rates and will not include any related taxes or other charges on a pro-rata basis.

MEALS AND INCIDENTALS

FIXED ALLOWANCE PER-DIEM FOR MEALS AND INCIDENTALS (M&I) FOR TRAVEL REQUIRING OVERNIGHT STAY

- The District will provide reimbursement to employees based on a maximum per diem rate for employee travel, which includes a fixed allowance for meals and incidental expenses (M & I). The M & I rate, **or fraction thereof**, is payable to the employee **without itemization of expenses or receipts**. Incidentals are intended to include miscellaneous costs associated with travel such as tips for baggage handling, etc. Generally, the applicable maximum per diem rate for each calendar day of travel shall be determined by the location of lodging for the traveler. **Important note: Remember to reduce the M & I daily rate for any meal(s)** included in conference registrations, provided by the Government, or otherwise provided at no cost to the employee (such as complimentary breakfast provided by hotel). No cost shall be claimed which is not incurred.
- The per diem rate to be reimbursed to the employee for meals and incidentals is only applicable when overnight travel is involved as established on the Reimbursement Rate Schedule. The M & I rates for Tennessee and out-of-state travel are the same as those for federal employees, and are available on the General Services Administration's web site. There is a standard rate for the continental United States (CONUS), and a list of exceptions. Please note that these rates may change effective October 1 of each year. The GSA website contains specific meal allowance amounts for each lodging location – these amounts should be used for subtracting meals that are not reimbursable.

Day of Departure and Return M&I Per-diem Reimbursement

Reimbursement for meals and incidentals for the day of departure and day of return when overnight travel is required shall be up to three-fourths of the appropriate M & I rate (either the in-state rate or CONUS Rate for out-of-state travel) at the rate prescribed for the actual lodging location. Reimbursement for M & I for the day of return shall be three-fourths of the M & I rate.

Meal allowances will not be provided for meal events that are included in conference registrations, provided by the government, or are otherwise provided at no cost to the employee.

- M&IE allowance must be adjusted for meals included in conference registrations, provided by the Government, or are otherwise provided at no cost to the employee (such as complimentary breakfast provided by hotel).
- The daily per-diem allowance will be reduced by deducting the appropriate amount shown at www.gsa.gov/mie. For meals provided on the day of departure and the last day of travel, you must deduct the allocated meal cost from the decreased M&IE rate.

One Day Travel M&I Per-diem Reimbursement

Reimbursement for a **single meal** (or meals) for employees on one-day travel status with no overnight stay will be at the per-diem rate of \$14.00 with no receipt(s) required. *(Does not apply when meal is included in conference registration, provided by the government, or is otherwise provided at no cost to the employee.)*

Meal Purchase(s) Responsibility

All meal purchases will be the responsibility of the employee (employee will use personal funds) during school-related travel and no receipts for meal purchases will be submitted for reimbursement. The appropriate per-diem amount will be claimed and paid to the employee upon submission and approval of Travel Reimbursement Request and TAR.

Staff and Board members in possession of a personal ORS credit card should restrict their use to travel-related expenses – however, **meal purchases should not be placed on ORS credit cards** due to the M&I Per-diem policy.

TRAVEL PROCEDURES AND TIPS (PLEASE VERIFY COMPLETION)

- All travel must be approved by the employee's supervisor **BEFORE** any arrangements are made. The authorized form for travel authorization is the Oak Ridge Schools Travel Authorization Request (TAR) and should be completed in Adobe and submitted electronically. A copy of the conference agenda should be attached to all Requests.

- All travel requests should be entered on a Purchase Order with the employee listed as the vendor. Individual line items should be entered with estimated costs for each line item and the anticipated “pay-to” vendor for that line item, including costs for registration, employee reimbursement amounts, hotel costs, airline costs, etc. See example below:

VENDOR:
VAN DYKE, JENIFER H.

SHIP TO:
OAK RIDGE SCHOOLS BUSINESS OFFICE
304 NEW YORK AVENUE
OAK RIDGE, TN 37830

QUANTITY	UNIT	DESCRIPTION OF ITEMS OR MATERIALS	UNIT PRICE	AMOUNT
1	each	Registration Fee for TN Spring Fiscal Workshop: vendor: TN Department of Education	35.00000	35.00
1	each	Lodging for TN Spring Fiscal Workshop: vendor: Music Road Hotel	130.00000	130.00
1	each	Estimated Travel Reimbursement for TN Spring Fiscal workshop: vendor: Jenifer Van Dyke	137.50000	137.50

- Please ensure the following are completed when submitting a Travel Expense Reimbursement Request to the Business Office:
 - 1) Attach all original itemized receipts for lodging, transportation, etc. Credit card payment slips will not be accepted. (Note: Receipts for meal purchases are not required – per diem rates apply.)
 - 2) A separate form must be completed by each claimant.
 - 3) All signatures must be original. No stamped or copied signatures will be permitted. (Digital signatures and approvals are allowable.)
 - 4) Requests for pre-payment of common carrier fare, registration, lodging, or any other charge must be supported and accompanied by some form of official communication from the provider that specifies the rate(s) being charged.
- Upon return from travel, submit the hotel statement to Business Services for verification of correct credit card charges and tax-exempt status charges.
- All pre-travel documents pertaining to reimbursement (ex: TAR) must be signed, approved, and submitted to the Business Office before commencing travel.
- All employees should submit claims for reimbursement as soon as possible following completion of travel (within 30 days per Board Policy 2.804). In accordance with Internal Revenue Service guidance (IRS Publication 463), reimbursement paid sixty (60) days after the date of travel may be considered as taxable income.

GENERAL REIMBURSEMENT RATES	
Mileage – Reimbursed based on Current Year Standard IRS Mileage Rate.	
Maximum Parking Fee Without Receipt	\$8.00/day
Meal & Incidental (M&I) reimbursement rate for all Tennessee locations not specifically listed below (any meals received by the employee as part of the conference registration, lodging, government or otherwise provided at no cost to the employee should be deducted from the Maximum M&I Allowance).	\$55.00/day

TENNESSEE MAXIMUM STANDARD PER-DIEM M&I REIMBURSEMENT RATES (BASED ON STANDARD CONUS RATES)						
Location	Breakfast	Lunch	Dinner	Incidental Expenses	Maximum Allowed	Departure & Return
All Tennessee Locations not listed below	\$13	\$14	\$23	\$5	\$55	\$41.25
Rutherford (Murfreesboro)	\$13	\$14	\$23	\$5	\$55	\$41.25
Knox (Knoxville)	\$13	\$15	\$23	\$5	\$56	\$42.00
Williamson (Brentwood / Franklin)	\$14	\$16	\$26	\$5	\$61	\$45.75
Hamilton (Chattanooga)	\$14	\$16	\$26	\$5	\$61	\$45.75
Shelby (Memphis)	\$14	\$16	\$26	\$5	\$61	\$45.75
<p>In-state meal per-diem rates follow the CONUS rates for Tennessee.</p> <p>Important note: any meals received by the employee as part of the conference registration, lodging, government, or otherwise provided at no cost to the employee should be deducted from the Maximum M&I Allowance. No cost shall be claimed that is not incurred.</p>						

OUT-OF-STATE REIMBURSEMENT RATES

When traveling outside Tennessee, employees should utilize the U.S. General Services Administration CONUS (Continental United States) rates provided by the federal government. To view the CONUS rates, go to <http://www.gsa.gov/portal/content/104877>. Use the CONUS standard meals and incidentals rate for all locations within the United States, which are reimbursed at 75% for day of departure and/or day of return. (Please attach a printout from this website supporting your reimbursement rate request for out-of-state travel)

(Important note: any meals received by the employee as part of the conference registration, lodging, government or otherwise provided at no cost to the employee should be deducted from the Maximum M&I Allowance).

Important Note: There is a Mobile App available for use in obtaining the daily CONUS rates entitled *GSA Per diem*