

## TRAVEL REIMBURSEMENT POLICY

**General:** The District recognizes that its employees, students and others associated with the District may incur travel and other related expenses in the performance of their duties or responsibilities to the District including participation in authorized school-sponsored co-curricular activities (“District Travel”). This policy applies to all employees, students, Board members, and candidates for employment. The policy may also apply to volunteers who perform substantial and necessary work or services for the District. Individuals who are subject to this policy should exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business.

**Approval for Travel and Expenses:** Any person covered under the District Travel policy must receive prior approval from the appropriate administrator before incurring any travel related expenses. Out-of-state travel must also be approved by district-level administration. The administrator shall issue a general fund or activity fund purchase order upon approval of the travel request. Any travel expenses incurred prior to the date of the purchase order shall not be eligible for reimbursement. Travel expenses paid by the district which cannot be utilized because an employee voluntarily changes his travel plans are reimbursable to the district by the employee. An employee requesting to attend professional development activity or job-related meeting must complete a Professional Development Leave Request Form.

Travel and other related expenses may include airfare, mileage at 75% of the rate allowed by the IRS, taxi fare, bus or shuttle fare, subway fare, railroad fare, lodging, tolls, meals, registration fees, and other miscellaneous expenses related to district travel. Effective 7/1/19, mileage will be paid at 100% of the rate allowed by the IRS.

Reimbursement for in-district travel from the site of employment to another location, which is necessary in the performance of employment duties, shall be made in accordance with the provisions of this Travel Reimbursement Policy.

As authorized by Title 704 Sec. 5.117 of the Oklahoma Statutes, meals other than student meals will be reimbursed on a per diem basis. Meal reimbursement is only available when travel requires an overnight stay. Reimbursement of meals and incidental expenses (e.g. tips given to porters, baggage carriers, and hotel staff) will be made at 75% of the Federal CONUS rates. Effective 7/1/19, meals and incidental expenses will be reimbursed at 100% of the Federal CONUS rates. The CONUS rates vary by location and include separate amounts for breakfast, lunch, dinner, and incidental expenses. If any meals are provided by others, the corresponding meal amounts shall not be included in the requested reimbursement. For example, if lunch is included in the conference registration fee, the lunch portion of the per diem shall be deducted from the daily per diem to determine the reimbursable amount. Additionally, on the day of travel, only meals that occur during travel status are reimbursable. Incidental expenses will be

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included in the partial day per diem if the employee attends a work-related activity that is a minimum of half-day.

Employees shall not be paid reimbursement for meal expenses incurred within the District unless allowed by policy.

Reimbursement for meals based on actual receipts is permissible provided that actual receipts may not exceed the per diem rates as defined in this policy.

Student meals will only be reimbursed for the amount of actual receipts submitted, not to exceed 75% of the Federal CONUS per diem rates.

**Reimbursement Requests:** A receipt or other evidence of payment is required for all expenses other than per diem and mileage. Appropriate documentation shall include a signed reimbursement claim form, which itemizes the various expenses incurred and a certificate of completion from the event or, if a certificate of completion is not issued, an agenda or itinerary of official functions attended. Itemized receipts of all expected reimbursable expenses (except meals and related tips when per diem is claimed) should be attached to the reimbursement claim form.

Upon completion of authorized travel, the employee should submit the appropriate documentation for reimbursement of travel expenses within sixty (60) days of completion of authorized travel but no later than the end of the fiscal year.. If the travel period is continuous, subsequent claims for reimbursement shall be submitted as necessary to cover the continuous period.

The claim form, along with all documentation, shall then be sent to the District's business office or site financial secretary for processing and payment. Reimbursement may be made from the General Fund or a School Activity Fund sub-account as determined at the time of approval/encumbrance.

**Personal Travel in Conjunction with District-Sponsored Travel:** When travel is extended for personal reasons, the employee shall indicate the exact date and time of departure from and/or return to official travel status.

An employee shall not be reimbursed for expenses incurred during a period of personal travel or for the travel expenses of a dependent or other travel companion, regardless of funding source. Individuals shall not be reimbursed for meals and/or lodging expenses incurred more than twenty-four (24) hours before and/or after the scheduled workshop or conference.

An employee is eligible for reimbursement of expenses related to the return travel to the original departure location.

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**Frequent Traveler Benefits:** Travel providers must be selected based on the best and lowest cost option and may not be selected based on whether they provide traveler benefits.

**Overbooked Flights:** An employee on district travel status may not take an incentive payment to voluntarily vacate his or her seat if such action will prevent the employee from completely fulfilling the purpose of travel. If giving up the seat will not interfere with the business purpose of the trip, and the employee chooses to do so, any additional expenses incurred as a result of vacating the seat will be borne by the employee and will not be reimbursed by the district. If travel is voluntarily delayed during duty hours, appropriate leave must be taken for time missed.