

412R – EXPENSE REIMBURSEMENT

3136 – EXPENSES – TRAVEL IN DISTRICT, IN STATE, AND OUT OF STATE

All employees must complete the appropriate forms, ~~including a Professional Leave Request Form~~, when claiming and applying for expenses under Policy **3136 412**.

- **Preapproval for Professional Leave and/or Travel**
- **Reimbursement for Actual Travel Expenses (accompanied by Preapproval when submitting for reimbursement)**
- **Invoice/Reimbursement Form (when requesting for reimbursements for things like in-district mileage,**

All travel including in and out of town workshops and seminars must be approved in advance by the appropriate supervisor. The **pre**-approval **form** must be **evidenced attached to on** a Professional Leave Request Form, **if applicable**.

All travel must be within the budgets established by the School Board. Travel costs shall be incurred in such a manner that actual dollar costs and employee time are minimized.

Effective July 1, 201**59**, meal reimbursements are limited to the per diem rate of up to fifty dollars (\$50) per day. **See graph on next page for breakdown by meal.**

All reimbursement requests must be claimed within a reasonable period of time. All requests must be submitted within 60 days after they were paid or were incurred to be reimbursed by the District.

Any excess advances must be returned to the District within 30 days after the date the expense was paid or incurred.

OUT-OF-STATE TRAVEL

All out-of-state travel must be germane to the School District's mission and approved by the Superintendent or designee. Out-of-state travel must be approved by the Superintendent or designee at least two weeks in advance **unless air travel is needed, then a minimum of three weeks' notice is needed**, unless some sort of an approvable emergency arises.

All arrangements for air travel must be coordinated by the Business Services' **Secretary designee**. **A minimum of a 21-day advance purchase is required for all air travel**. Only coach travel is permissible unless the difference between first class and coach fare is (1) pre-paid by the employee, Board member or community member, (2) is required by law, or (3) is less costly than a 21-day advance coach fare.

According to Minnesota State Statute 15.435 "Whenever public funds are used to pay for airline travel by an elected official or public employee, any credits or other benefits issued by any airline must accrue to the benefit of the public body providing the funding". Therefore, all air travel rewards/credits shall be credited to an account set up for the individual through the District. All District related travel credits must be credited to the individuals District account, and once a reward is earned the reward can be used for District related travel only.

TRAVEL EXPENSES/REIMBURSEMENT

Reimbursement rates for travel shall be within Board adopted or amended budget guidelines and travel shall be at the most reasonable rate. Registration fees and banquet events shall be at actual costs. All costs must be reasonable and necessary. If a conference or seminar has an agenda, a copy of that agenda is to be attached to the Reimbursement Request.

Reimbursements for meals are limited to the following amounts:

MEAL LIMITATIONS (EFFECTIVE JULY 1, 2015~~9~~)

	<u>Per Diem Rate</u> <u>Per Meal Rate</u>
Breakfast up to	\$7.00 \$10.00
Lunch up to	\$10.00 \$14.00
Dinner up to	\$21.00 \$23.00
<u>Full day per diem</u>	\$38.00 \$47.00 per day

Receipts are not needed when the full day per diem rate is claimed.

If the workshop, conference, seminar, etc. has meals included in the cost of registration, the full day per diem may not be claimed, only the meals which must be purchased. A copy of the agenda must be included with reimbursement requests.

When claiming individual meals:

1. **Breakfast:** An employee may not claim reimbursement for breakfast unless the employee was required to leave home before 6:00 a.m. or to be away from home overnight.
2. **Lunch:** An employee may not claim reimbursement for lunch unless the employee has traveled more than thirty-five (35) miles from the employee's regular or temporary workstation.
3. **Dinner:** An employee may not claim reimbursement for dinner unless the employee was still in a travel status after 7:00 p.m. or away from home overnight.
4. If an employee is claiming reimbursement for a meal, the employee must indicate the starting and ending time of the travel.

TRAVEL EXPENSES/REIMBURSEMENT

Limousine, bus service, taxi, **car service** or car rental must be at the most reasonable or efficient convenient rate that can be demonstrated. **This District has an arrangement with a local car agency for car rentals.**

Parking receipts must be submitted with the reimbursement forms.

Allowance for use of private vehicle is to reflect the current IRS approved reimbursement rate. Because it is possible that the rate may change within a reimbursement period, it is the employee's responsibility to ensure the reimbursement is submitted at the proper rate/rates. The District reserves the right to establish an effective date different than the

IRS effective date. District reimbursement rates and the effective dates will be posted on the District web site. The employee must provide actual odometer readings or use the mileage allowed per the District's official mileage charts.

<u>MILEAGE REIMBURSEMENT RATES</u>	
<u>Effective Date</u>	<u>Rate</u>
<u>February 1, 2009 – January 1, 2015</u>	<u>\$ 0.55</u>
<u>January 1, 2015 – Current</u>	<u>\$ 0.575</u>

The employee must submit airline travel credits (i.e. mileage, etc.) or other benefits (i.e. monetary vouchers for future travel, etc.) earned to the Business Services' **Secretary designee** within 14 days of the date of the return. A brief explanation of the reason for receiving the credit or benefit must be attached.

Long distance business-related telephone calls or other identified incidental expenses necessary for business purposes must be verified for appropriateness.

MILEAGE REIMBURSEMENT FOR USE OF PRIVATE VEHICLES

Personnel who incur expenses for official travel shall be reimbursed in accordance with the following guidelines at the official rate of reimbursement as established by the Internal Revenue Service.

GENERAL INFORMATION:

- 1. All mileage claims must be logged on the School District's mileage log form.**
- 2. Only those mileage claims submitted for reimbursement within sixty (60) days after they are incurred will be reimbursed.**
- 3. No allowance will be made for mileage between an employee's residence and his/her work place for the first report to work and the first return home in any regular work day. A maximum of forty (40) miles, round trip, will be allowed from an employee's residence to a destination within the School District.**
- 4. When an employee is required to report to a different work destination at the beginning of the day than they are normally assigned, the employee will be reimbursed for the lessor of the two: either the mileage from their home to the new destination or the mileage from their normal work location to the new destination.**
- 5. All reimbursement claims must be submitted on an expense voucher accompanied by a copy of the log covering the period for which the claim is made. The log must be complete with sufficient information included so that it is easily understandable. Logs will be returned to originator whenever information is incomplete.**

6. **On trips from school location to school location, mileage claimed may be based on actual odometer readings (not trip counter readings). If the actual odometer readings are not provided, the District's mileage chart must be used.**
7. **No claims for reimbursement shall be paid unless the claimant provides evidence of maintaining adequate insurance coverage.**

SPECIFIC

Mileage may be claimed when the employee:

1. **Performs visits to pupil residence for parent/guardian consultation.**
2. **Attends meetings called by the administration.**
3. **Performs work at a second location in any one work day.**
4. **Returns a sick student to the student's residence.**
5. **Attends evening events such as P.T.A. meetings, citizen committee meetings, School Board or School Board Committee meetings, but only if the employee is officially asked to be present or has an official duty to perform.**
6. **Attends in an official capacity (e.g., coach, assistant coach, assigned administrator) an extra- or co-curricular event.**
7. **Responds to emergency situations during normal non-work hours.**
8. **Is required to visit various agencies, business establishments, banks, and other related areas for business or instructional reasons.**

IN-DISTRICT MEALS AND REFRESHMENTS

For an in-district meal or refreshment expenditure to be reimbursable to an employee or paid directly to a vendor, it must meet the criteria of being necessary, reasonable, and must directly serve a public purpose. Meal and meeting expenditures that are allowable consist of the following:

1. A meal expenditure may be permissible if only a breakfast, noon, or dinner meeting is possible and participants from outside of the School District are available only at that time.
2. A meal is provided at a training session and the session is conducted throughout the reasonable meal time.
3. A meal is available in lieu of overtime pay.

4. Coffee, soft drinks and/or juices and snacks are permissible for staff meetings.
5. A meal is reimbursable to an administrator or Board member if the meal is the product of an organization, other than the district itself, and attendance is necessarily beneficial to the School District and such benefits could not be obtained other than by attending the meal itself.
6. A meal is provided in lieu of hiring a substitute teacher.
7. Modest refreshments such as coffee, soft drinks, and/or juices and snacks may be provided at functions where members of the general public are in attendance.
8. Individuals who are not District employees are not entitled to travel expenses such as meals, lodging, or transportation unless prior approval has been given by the Superintendent or the appropriate director.
9. A modest meal can be provided students, parents, and staff if part of a school or District sponsored educational event or activity.
10. Reasonable transportation and childcare expenses may be permissible for parents who may otherwise not be able to attend an educational event or activity at their son/daughter's school or program. The expenditure would require prior approval by the building principal or program administrator and would be paid to the service provider upon proper documentation.
11. If the budget for a program or grant which includes specific funding for parent or community involvement is approved by the Board and a State Agency, the expenditure of such funds is appropriate and can be approved by the administrator responsible for the program or grant.
12. The Chair of the School Board shall have the prerogative to determine if a meal is needed for a Board meeting, committee meeting, or in-service meeting.
13. All expenditures for meals other than the twelve listed above are the personal responsibility of the School District employee who incurred the expense.

The Superintendent may grant exceptions to these general rules based on need to attend and availability of funds.

Approved: 06-09-1970

Revised:	04-20-1976	03-21-1995	06-21-2005
	10-09-1979	06-20-1995	10-18-2005
	08-14-1984	02-17-1998	01-01-2007
	08-11-1987	03-21-2000	01-20-2009
	11-13-1990	07-17-2001	03-18-2015
	01-18-1994	10-19-2004	<u>06-16-2015</u>

Revised and Renumbered: