

4.0 EMPLOYEE EDUCATION, TRAVEL, AND EXPENSE REIMBURSEMENT

4.1 GENERAL TRAVEL EXPECTATIONS

All employees of the District are expected to use good judgment regarding the expenditure of the funds for travel expenses. Only through teamwork can the costs of travel for District business be minimized. All travel expenses and reimbursements shall be based on ordinary and necessary expenses incurred while carrying out District business.

4.2 DOCUMENTATION OF TRAVEL OBJECTIVES

The procedures for documenting the expenses involved with employee travel on District related business activities are designed to provide public accountability in two areas:

- A.** Pre-approval of all travel requests to insure that the travel is appropriate to the needs of the District and that budgeted funds are available for specific travel requests; and
- B.** A complete accounting of the actual expenses and per-diem rates for travel insures that the expenses reported for reimbursement are appropriate. Proper documentation shall be provided within IRS and US General Services Administration (GSA) guidelines

4.3 TRAINING AND TRAVEL APPROVAL

The District Manager shall authorize training, registration, travel, and attendance expenditures in advance within the budgeted amounts adopted by the District Board of Directors for senior staff members. The Supervisors shall authorize, with the concurrence of the District Manager, registration, travel and attendance expenditures in advance.

4.4 TRAINING & TRAVEL REQUESTS AND EXPENSE REIMBURSEMENTS

At least two weeks prior to the anticipated travel, employees shall submit APPROVED TRAINING and APPROVED TRAVEL VOUCHER forms to the Director of Administrative Services or District Manager. All known travel and training expenses shall be listed on the approved travel voucher.

Employees may elect to receive reimbursement prior to travel in the form of meal per-diem or employees may elect to claim actual expenses and be reimbursed after travel.

The District will not pay or reimburse for any expenses that are lavish or extravagant. An expense is not considered lavish or extravagant if it is reasonable based on the facts and circumstance.

4.5 TRAVEL EXPENSE SETTLEMENT AND DOCUMENTATION

Employees shall be provided an advance meal per-diem reimbursement by submitting an approved travel voucher to the Director of Administrative Services at least two weeks prior to the anticipated travel. The advance meal per-diem reimbursement shall be calculated using current GSA rates for the area of travel.

For employees claiming actual expenses, ALL receipts for travel related expenses must be turned in to Director of Administrative Services within one week after the travel has been completed ONLY

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authorized expenses will be reimbursed. *Actual expenses must be substantiated, or no reimbursement shall be relinquished.*

4.6 TRAVEL GUIDELINES

The following general guidelines apply to the reimbursement of employee travel expenses.

4.6.1 Transportation - Employees may elect to use a District vehicle when available for travel. If no District vehicle is available and employees are authorized to use a personal vehicle for work-related travel, the employee will be reimbursed 100% of the current Federal Business Standard Mileage Rate.

If a District vehicle is available for use and an employee elects to use their own vehicle, the employee shall be reimbursed based on 30% of the current Federal Business Standard Mileage Rate. Reimbursement is limited to mileage to and from destinations required for District business and mileage to and from lodging within a reasonable distance from District business.

The District requires employees to purchase Oregon's minimum liability insurance in accordance with ORS 806.010, Oregon's mandatory insurance law, when utilizing personal vehicle during District business.

The District shall reimburse employees authorized to travel outside of the District, driving personal or District vehicles, for tolls, reasonable parking expenses, and public transportation fares related to District business. Receipts shall be submitted to Director of Administrative Services prior to reimbursement.

4.6.2 Travel Time - Hourly employees that document actual travel time at or exceeding 6 hours in a day shall be paid for 8 hours, and shall record that time as 8 hours on their timecard. Hourly employees traveling at least 6 hours are required to document travel times on the back of their timecard and sign. Employees shall take the shortest route to and from training destinations per mapping websites such as mapquest.com and googlemaps.com, deviation from shortest route shall be by permission of the employee's direct supervisor.

4.6.3 Lodging - Lodging accommodations shall be appropriate to the purpose of the trip. Receipts for lodging shall be retained and turned into the Director of Administrative Services. If prior payment has not been secured, reimbursement for lodging is limited to the base expense of a single room. Receipts shall be remitted to Director of Administrative Services prior to reimbursement.

4.6.4 Meal Per-Diem - **The federal per-diem allowance for meals and incidental expenses shall be used for meals and incidentals.** When the federal per-diem allowance is used for meals and incidental expenses, the employee is deemed to have accounted for these expenses.

4.6.5 Telephone and Related Expenses - Expenses for telephone and other related communications expenses are reimbursable only if they are directly related to District business, and are supported by actual receipts. When personal telephone calls are charged to the District, they shall be reimbursed within two weeks of receipt submittal to Director of Administrative Services.

4.6.6 Registration and Tuition Fees - Expenses for registrations and/or tuition fees for approved training related to the District business shall be pre-paid by the District whenever possible. Any unforeseen related expenses directly required to complete training or expenses shall be reimbursed. A receipt of

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the registration and/or expense shall be remitted to the Director of Administrative Services prior to reimbursement.

4.6.7 Accompanied Travel - Expenses for family members who accompany employees during travel are not reimbursable.

4.6.8 Unforeseen Reimbursable Expenses - Travel Vouchers shall be completed to the best of the employee's ability in order to determine accurate travel costs, however, some expenses cannot be anticipated. Unforeseen reimbursable expenses accumulated in the course of District business shall be reimbursed to the employee as soon as possible after receipt submission to Director of Administrative Services. Unforeseen reimbursable expenses include, but are not limited to:

- Parking Fees
- Public Transportation Costs
- Tolls
- Materials directly required to attend a training or conduct District business

4.6.9 Non-reimbursable Expenses - Non-reimbursable expenses include, but are not limited to:

- Hotel expenses such as mini-bar/snacks, movies, games, and any form of room service or tips
- Alcohol
- Any recreational events or expenses not directly related to training or District business

4.7 DISTRICT ENCOURAGES EDUCATION & TRAINING

The District encourages continued education and training for employees to enhance job performance and assist in potential career advancement within the District. The District shall provide such in-service training as deemed necessary and beneficial to the delivery of services and performance of duties.

4.7.1 Training Expenses - All expenses related to training or college courses shall be fully paid for or reimbursed, when required by an employee's supervisor.

Employees may request compensation for the costs of college-level technical or other academic course work, seminars, and conferences relevant to their current or future roles in the organization. Such requests must be made in writing to the Supervisor (and forwarded with a recommendation to the District Manager for approval prior to the employee's enrollment or participation). Reimbursement for college-level course work will only be made if the employee receives a passing grade. All training activities involving a cost to the District must be approved in advance, in writing.

4.7.2 Training Times - Hourly employees that travel or attend training related to District business on a weekend day or when training or travel causes an employee to work or attend more than 8 hours per day shall take equal time off time during the normal work week to prevent overtime. Time taken off during the normal work week is at the discretion of the employee's supervisor. Any exceptions to taking time off during the normal work week shall be made at the discretion of the employee's supervisor. The Supervisor will do their best to accommodate the needs of the employee when assigning time off due to weekend training.

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Salaried employees that travel or attend training related to District business on a weekend day have the option to take an equal number of days off without having to use paid time off or incur a reduction in pay.