



## ARTICLE XXIV TRAVEL AND TRAINING POLICY

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### I. POLICY:

The intent of this policy is to make a uniform provision for the reimbursement of necessary expenses of Town employees or officials of the Town who are required to travel within or outside of the Town boundaries in the performance of their duties and in the interest of the Town's affairs.

### II. PURPOSE:

The Town of Selma recognizes that employees and officials are required to travel both within and outside of the State of North Carolina for the purpose of representing the Town at meetings and professional associations, as well as for training to enhance their skills regarding the performance of their various positions within the Town government.

### III. PROVISIONS:

It is inherently understood in this policy that an individual traveling on official Town business is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, indirect routes, delays, or luxury accommodations and unnecessary services, unjustified, or solely for the convenience or personal preference of the traveler in the performance of official Town business are not acceptable under this standard, and travelers will be held responsible for unauthorized costs and additional expenses incurred for personal preference or convenience.

Should an employee voluntarily separate from the Town for any reason within one (1) year of participating in or completing external training, educational seminars, conferences or other professional development courses, the employee is responsible for the repayment of such training expenses incurred by the Town in the amount of \$500 or greater per course or program. Training expenses include but are not limited to registration fees, materials, travel, lodging, per diem and/or examinations.

The repayment amount shall be:

<u>Separation Date</u>	<u>Repayment Amount</u>
1-90 calendar days after course or program	100%
91-180 calendar days after course or program	75%
181-270 calendar days after course or program	50%
271-365 calendar days after course or program	25%
More than 365 days after course or program	0%

Repayment of funds will be deducted from final payroll. Should there be insufficient funds from the final check for full recovery, the funds must be paid within 45 days from separation. After 45 days, the funds will be pursued to the fullest extent of the law.

**Travel Reimbursement:**

The travel reimbursement form provided for the traveler must be turned in for reimbursement within ten (10) days of the employee's return. This form lists all mileage, private or public transportation, lodging, meals, registration, and other travel expenses which are reimbursable. Itemized receipts for lodging, meals, registration, and private or public transportation are to be attached to and made a part of the reimbursement form. For taxis, airport shuttles and buses, receipts may not be available or provided; therefore, attach if possible. The reimbursement form must be approved by the Department Head and signed by the employee before being presented to the Finance Office for reimbursement.

**Transportation Cost for Employee:**

This is the payment for mileage allowance or actual cost of public transportation as applicable. If rental vehicles are used for both business and non-business purposes, reimbursement to the Town for the non-business portion will apply.

**Town-Owned Vehicle:**

This method of transportation is to be used whenever a Town vehicle is available. The Department Head may authorize reimbursement to the employee for exact operation expenses in circumstances where direct credit charges cannot be made to the Town.

**Privately-Owned Vehicle:**

When no Town vehicle is available, this mode may be used if specifically authorized by the appropriate Department Head. Reimbursement for operation expense shall be limited to the mileage allowance mandated by the IRS.

**Transportation by Common Carrier:**

Reimbursement for air, rail or bus fare is limited to business or coach fare, substantiated by a receipt. Quotes must be obtained from more than one (1) common carrier if multiple carriers exist; and (2) documentation that the lowest fare available was used must be submitted on the trip sheet.

**Rental Vehicles:**

Reimbursement of rental vehicle expenses will not be authorized without prior approval by the Town Manager. If approved, the rental vehicle should be secured at the lowest practical cost.

**IV. TRAVEL DESTINATIONS****Local Travel:**

Town employees, who by the normal nature of their duties are required to travel regularly within the Town and are individually authorized by the appropriate Department Head, are eligible for reimbursement of transportation expense on a monthly basis.

**In-State/Out-of-County Travel:**

Approved travel expenses outside the county but within the state for Town purposes or purposes in the best interest of the Town, such as training, conferences, professional meetings, etc., may be reimbursed to the limits of the policy for:

- Transportation Costs
- Lodging
- Meals
- Registration Costs
- Necessary Incidental Expenses (parking, tolls, taxis, etc.)

**Out-of-State Travel:**

Out-of-state travel begins when the employee leaves the state and remains in effect until the employee returns to the state. Out-of-state travel requests by employees and Department Heads must be pre-approved by the Town Manager.

**V. REIMBURSABLE EXPENSES****Mileage Allowance**

The amount authorized to be paid on a per-mile basis for travel by privately-owned vehicle will be determined by the IRS mileage rate at the time of travel.

**Meal Reimbursement Rates**

The amount authorized to be paid will be determined by using the following link at the time of travel: <https://www.gsa.gov/travel-resources>. This link has a calculator to

provide the current meals and incidental expenses (M&IE) and gives full details on current federal allowances in the continental United States.

Meals that are provided in the registration costs will not be reimbursed to employees who choose to eat on their own elsewhere. A spouse's or other relative's meal must be paid with private funds; the only exception being when a spouse accompanies a Town representative to an official breakfast, luncheon, or dinner to which the spouse was invited. **Itemized receipts must be turned in for reimbursement.**

Tips are considered to be included in the above meal reimbursement rates.

### **Lodging**

To receive reimbursement for lodging expenses, an itemized hotel bill must be attached to the reimbursement form.

### **Registration Costs**

Registration costs should be paid directly by the Town. When an employee personally pays a registration fee, a receipt for payment should be obtained and is preferable to a cancelled check for reimbursement purposes. Additional registration costs for recreational and entertainment activities will not be paid by the Town. However, meal functions are not included in this requirement and are eligible for payment by the Town in lieu of the meal reimbursement payment.

### **Other Costs**

Reasonable parking fees, tolls, taxi charges, and expenses of a similar nature when appropriate to the travel are reimbursable upon submission of appropriate documentation of the same. The Town Manager shall approve or disapprove all other expense reimbursements not clearly defined in this Policy or those which have been questioned.

### **Telephone Calls**

Employees are not allowed to charge long distance telephone calls to the Town for calls of a personal nature. All long-distance calls that are to be paid by the Town are those made pursuant to the employee conducting official Town business.

## **VI. NON-REIMBURSABLE ITEMS**

The following list of non-reimbursable items is not all-inclusive. The Town Manager shall approve or disapprove all other expense reimbursements not clearly defined in this Policy or those which have been questioned.

- Any miscellaneous expense not supported by a receipt
- Meals included in registration
- Travel to and from workplace

- Souvenirs from the trip
- Items purchased to be used as door prizes or raffle items
- Non-employee expenses
- Alcoholic beverages
- Movie rentals
- Traffic fines

## **VII. MISCELLANEOUS**

### **Credit Card:**

Employees and officials authorized to use a Town credit card may elect to use it instead of the reimbursement option; however, meals are still subject to the meal rates listed in Chapter 4, Section 2, of this Appendix E, Travel Policy. All itemized receipts for expenditures must be submitted with the travel reimbursement form to the Finance Office in order for the expenditures to be approved.

### **Travel with Others:**

When two or more employees are traveling to the same destination, maximum use shall be made of special group travel discounts and joint use of transportation including taxi cabs, Town-owned vehicles, or privately-owned vehicles. Travel with representatives of other government units is encouraged whenever possible.

### **Commuting:**

No reimbursement shall be made for use of a personal vehicle in commuting from an individual's home to his or her workplace.

### **Extraordinary Travel or Cost:**

In instances of travel not covered by this Policy, or where the actual necessary costs exceed the maximum reimbursement allowed and the travel is in the best interest of the Town, the Town Manager may approve reimbursement of actual costs beyond the maximums stated herein.

### **Travel Expenses Not Addressed by This Policy:**

Any travel expenses falling outside the realm of this Policy must be approved by the Town Manager.

### **Travel Advances:**

Hotel accommodations may be paid directly to the hotel in advance. The itemized receipt must be turned in with your travel reimbursement form. Any other travel advance must be approved by the Town Manager.

## VIII. REIMBURSEMENT PROCEDURES

### **Form & Receipts:**

The travel reimbursement form and supporting receipts must be submitted to the Department Head for approval. After approval by the Department Head, the form should be forwarded to the Town Manager who will then forward the form to the Finance Department for payment.

### **Accuracy Check:**

The Finance Department will determine that the travel form and receipts have been properly approved, that they are mathematically correct, that requested reimbursements agree to submitted receipts, and that they are within the limits set by the Policy. If an error in the reimbursement request is found, the requesting party will be informed, and the error will be corrected before payment is made.

### **Trip Cancellation:**

When an employee cancels an approved trip and the Town has paid airfare, registration and/or other related fees or issued a travel advance, a memo must be sent to the Finance Department explaining the cancellation. The Finance Office will be responsible for refunds due to the Town. Non-refundable expenditures will be reviewed on a case-by-case basis by the Town Manager.

***\*Employees must receive pre-authorization for any travel/training expense of \$200 or more.***

Policy adopted by Selma Town Council

Effective Date: November 14, 2000

Amended August 11, 2015

Amended May 11, 2021

*As of May 11, 2021, this policy replaces and supersedes any previous policies, or unwritten policies or practices covering the same subject.*