

6830 EXPENSE REIMBURSEMENT

School district employees, officials and members of the Board of Education will be reimbursed for reasonable, actual and necessary out-of-pocket expenses, which are legally authorized and incurred while traveling for school related activities.

Only expenses necessary to the purpose of the travel shall be reimbursable. Transportation costs such as taxi cabs are allowable only for essential transportation. Mileage will be paid at the rate fixed by the federal Internal Revenue Service for business travel. Tax exemption certificates shall be issued and utilized as appropriate.

The Board, shall determine and approve out of state conferences to be attended by Board members and the Superintendent of Schools.

The Superintendent shall determine whether attendance by district staff at any conference or professional meeting is in the best interest of the district and eligible for reimbursement of expenses under this policy.

To obtain reimbursement, the claimant must complete and sign a conference expense reimbursement claim form, attach all receipts or other expense documentation, together with a copy of the approved conference attendance request form and evaluation report (if required), and submit the same to the appropriate administrator. An approved purchase order must be in place prior to attending the event. Reimbursement shall only be made after such claim has been audited and allowed.

Regulations concerning expense reimbursement shall be attached to this policy and shall be reviewed annually and revised as appropriate.

Ref: Education Law §§1604(27); 1709(30); 1804; 2118; 3023; 3028
General Municipal Law §77-b

Adoption date: September 17, 2018

6830-R EXPENSE REIMBURSEMENT

The district shall reimburse district employees, officials and members of the Board of Education for reasonable, actual and necessary out-of-pocket expenses incurred while traveling for school-related business providing an approved purchase order is placed prior to attendance and upon receipt of a completed conference expense reimbursement claim form with itemized receipts along with approved attendance form (MLP). The following rules shall guide the reimbursement of school-related travel expenses:

Conference Approval

Employees seeking to attend a conference for the purpose of conducting school business that will require District expense must have signed approval prior to attending the conference.

- All professional (certified) staff must use My Learning Plan (MLP) to submit a conference travel request and complete the MLP application in full including expected costs.
- Non-certified staff who do not have access to MLP must submit a conference request form to their supervisor and be approved by their department supervisor with final approval by the Assistant Superintendent for Human Resources.

Once a conference is approved through MLP, purchase orders should be placed for the following:

- Conference Venue - registration of employee to attend conference.
- Hotel Accommodations.
- Employee's Name - for reimbursements of meals, travel etc.

A copy of MLP must be submitted with each requisition for the above.

Transportation

- Travel shall be by the most economical method, whether by private automobile, school vehicle or common carrier such as bus, train or plane.
- If travel is by private automobile, mileage shall be reimbursed at the level approved by the Internal Revenue Service for business travel. Parking and tolls will also be reimbursed but gasoline will not.
- Rental car expenses will be reimbursed only if authorized in advance. Receipts must be attached.
- Air travel is only allowed when determined by the Superintendent or the applicable administrator to be in the district's best interest. Air travel shall be reimbursed at the lowest feasible fare available and shall not exceed regular coach class fare. Travel arrangements should be made as soon as reasonably practicable so as to avoid payment of a higher fare due to a late booking.

Lodging

- Persons traveling on district-related business are expected to secure the most reasonable rate for necessary hotel accommodations. The district will reimburse for actual lodging fees up to the maximum lodging fee set by the federal government for that location.
- When the rate is pre-determined by the organization sponsoring the event, the traveler shall secure a room rate at no more than the pre-determined rate notwithstanding what the federal travel reimbursement rate is. Hotel accommodations at a rate other than the most reasonable rate or a pre-determined rate described above will be reimbursed only if approved by the Board President (for members of the board and the Superintendent), the Superintendent (for all administrators) and applicable administrators (for all others) prior to the stay.
- Approved hotel expenses include only the room rate, resort fee and taxes (outside NY State). It is the employee's responsibility to present upon check in a Tax Exempt form (ST-129) and their school ID for all NY State hotels. No sales tax will be reimbursed by the District for lodging in NY State,
- An itemized bill must be presented for reimbursement for all lodging expenses.

Meals

When meals are not provided as part of the conference registration, the cost of reasonable meals including gratuities may be reimbursed when itemized receipts are submitted. The maximum reimbursable meals charges, including gratuities, for persons traveling for district related purposes will not exceed the federal per diem rate established for each primary destination in the U.S. General Service Administration published at <http://www.gsa.gov/mie>. These rates are adjusted annually. The Meal & Incidental Expense rates differ by travel location. View the per diem rate for your primary destination to determine which Meal & Incidental Expense rates apply.

- First and last day rates apply to all meal reimbursements.
- If meals are included in the conference registration fee, reimbursement for those mealtimes will be excluded.
- Alcoholic beverages are not an approved expense.
- Snacks are not reimbursable unless they have taken the place of a meal.
- Tips are an approved expense but not more than 20% of the total check and require documentation.
- Sales tax on meals is a reimbursable expense.
- An itemized restaurant receipt listing food purchased and tip is required for reimbursement.

Personal Expenses

The district does not reimburse persons traveling on district-related business for personal expenses including, but not limited to, pay television, hotel health club facilities, alcoholic beverages, theater and show tickets, and telephone calls and transportation costs unrelated to district business.

Process for Reimbursement

Upon return from the conference, the employee must complete and submit the Conference Expense Claim Form, a signed receiving copy of the purchase order, copy of MLP and all original receipts to be reimbursed. If MLP was not used, attach the Conference Approval Sheet. Reimbursement claims must be submitted within 30 days of travel.