

Travel Guidelines

1. **Policy**

The policy of the County is to reimburse the official/employee traveling on authorized business for all legitimate expenses incurred as a result of the travel and authorized in this procedure. The department head or his designee is responsible for monitoring the initial need for the travel, the availability of funds for such and its conduct to the end that the cost of such travel is held to a reasonable minimum.

Authorized travel is not a right or privilege of position and the policy shall be administered in a manner that does not discriminate on the basis of the age, sex, religious belief, or race of officials and employees who are appropriate to accomplish the purpose of the travel.

The Travel Authorization form must be completed by the Departments and approved by the County Manager. Attach a copy of the program agenda to the authorization form. These procedures must be completed and approved prior to booking reservations and requesting purchase orders. Travel advances should be processed in the Accounts Payable check run closest to the employee's departure date. No off-line checks will be issued for Travel Advances. Upon return from the approved seminar/conference, the Travel Reimbursement from County Advance form, with receipts attached, must be completed within five (5) days or the entire advance will be deducted from the next payroll check.

NOTE: The word "officials" refers to people holding positions of appointment or election with Halifax County, including members of boards, commissions, task forces, et cetera, volunteers, and elected officials.

2. **Travel** (Approval of attendance at conferences, seminars, and out-of-state meetings Attendance - Out-of-state conference, Attendance limitation guidelines)

The County Manager shall authorize out-of-state travel of officials/employees of RiverStone Counseling and Personal Development, the Health Department, and the Department of Social Services. The number of people approved for any one meeting should be no more than is required to cover all portions of the meeting and/or meet requirements for special presentation by county personnel.

The County Manager should approve special responsibilities in organizations or activities that might require unusual out-of-state travel prior to acceptance.

3. **In-State Travel**

The County Manager shall approve in-state travel for all departments.

4. **In-County Travel**

The department head and County Manager must approve in-county travel to meetings, seminars, or other similar functions, regardless of the distance, if there are any associated expenses. Expenses reimbursed under this method are limited to otherwise legitimate business expenses covered by County travel procedures.

5. **Air Travel**

Air travel arrangements should be made at the lowest fare available under the travel circumstances and time requirements.

Discount fares should be pursued when travel plans are definite and discount conditions exist, such as a Saturday night stay over. Approval of Saturday night stayovers not related to regular County business will be considered on an individual basis and would require a net economic benefit to the County due to the lower fare savings as compared to the normal applicable fare. All air travel will be coach service unless approved otherwise by the County Manager.

A County traveler may retain frequent flyer coupons provided the traveler has obtained the lowest fare possible with any carrier. Selection of higher fares or the manipulation of routes for the purpose of accruing value coupons is prohibited.

6. **Lodging**

Lodging expenses will be reimbursed at the actual cost of the room, providing that the employee will seek reasonably priced lodging. Travelers should take advantage of special convention or travel agency negotiated rates. Officials/employees sharing a room with a non-County individual are responsible for reporting and requesting reimbursement of lodging expenses at no more than the single occupancy rate. Employees of the same gender will share a room. Separate rooms maybe obtained at the employee’s own expense

7. **Meals**

Reimbursement for meals is limited to the total actual expenses incurred during the day or part of day applicable and documented by receipts with the maximums listed below. Breakfast reimbursements will not be allowed when the hotel offers a complimentary continental meal.

Meals	In-State Maximum	Out-State Maximum
Breakfast	\$5.00	\$6.00
Lunch	\$8.00	\$10.00
Dinner	\$16.00	\$23.00
	\$29.00	\$39.00

On the originating day of any travel, the meal schedule shall be as follows:

- Breakfast - depart duty station prior to 7:00 AM
- Lunch - depart duty station prior to 10:00 AM and return after 2:00 PM
- Dinner - return to duty station after 7:00 PM

Exceptions to the meal allowance limitations may be made in situations where opportunities to purchase meals within the limitations are unavailable or are available only with additional

costs or by placing the official/employee in an unsafe situation. The County Manager with such documentation will grant such exceptions on a case-by-case basis as he may require.

8. **Car Rentals**

The appropriate department head and the County Manager should approve car rentals in advance. Car rental expenses incurred while on County business are reimbursed upon the completion of the trip. Rental receipts are required to be submitted with the expense report for reimbursement. The use of a rental car for business use that is not pre-approved must be clearly justified on the final expense statement. To be justified, car rental must be based on grounds of cost (including employee time and practicality).

The County has approved the use of compact or medium size cars. Larger cars should be used only when the number of people or the amount of mileage so dictates.

Liabilities and collision insurance should be purchased on rental vehicles to protect the traveler and County in case of accident. Such coverage is not included in the County's regular insurance coverage.

9. **Public Transportation**

Actual reasonable expenses are paid for public transportation connected with out-of-county travel on County business. Travelers are expected to use the most reasonable and economical means of transportation available. Reimbursement for expenses for travel to the airport from the traveler's office or home may include personal auto mileage and direct parking costs, or necessary taxi or limousine service.

10. **Personal Auto**

When travel is authorized by personal automobile, the County Commissioners annually for such transportation costs will set the amount of reimbursement per mile. The County Manager is allowed to make periodic adjustments for auto mileage rates in accordance with IRS regulations. Other reasonable mileage will be allowed in lieu of taxi expenses. Reimbursement for use of a personal automobile for out-of-state travel, in addition to the cost of any extra meals and lodging resulting from such use of the personal automobile, shall not exceed the otherwise applicable airfare for such travel for the official/employee.

11. **Telephone**

A personal "safe arrival" three-minute telephone call is authorized up to a maximum of \$5. An additional three-minute telephone call of up to \$5 is permissible in the event of an itinerary change or after a seven-day period of absence. Any phone charges other than as authorized must be fully detailed and business related. All long-distance calls are to be documented on the Travel Expense Report form, giving party, location, and telephone number called and the business project discussed.

12. **Special Conference or Meeting Expense**

Expenses incurred by the County Commissioners, County Manager, Deputy County Manager, and Department Heads while transacting County business incidental to the event for which travel was authorized, may be reimbursed and will be identified on the Travel Expense Report under the "Other Expense" category. Supporting documentation for such

expenses must include validated receipts and must list the date, description of expenses discussed, names and organization or company affiliation of persons attending the outcome of conference or meeting.

13. **No Duplicate Reimbursements**

All expenses are to be deducted from other applicable reimbursed categories. (For example, an official/employee traveler shall not be permitted to report his meal cost as part of any conference expense and claim the full meal allowance also.)

The County will not reimburse for traffic violations, towing charges or other acts of negligence caused by the employee.

14. **Refunds**

In the event of canceled travel plans, the traveler should pursue all refunds available.

15. **Adjustment of Policy**

The County Manager shall have the authority to make timely and necessary administrative adjustments to this policy that reflect prudence and applicable IRS regulations. The County Manager must approve any exceptions to this policy.

16. **Applicability**

This policy is applicable March 1, 2002, and all other policies in conflict with it are rescinded.