

YELLOWSTONE COUNTY TRAVEL POLICY

Policy #24-86

This policy supersedes any previous policy that affects travel expenditures. For the purpose of this policy, Elected Officials are those persons elected by the voters of Yellowstone County and Department Heads are those persons who are directly or indirectly accountable to the Board of County Commissioners. This policy does not grant any public officials more authority than is already granted through state law. The following travel policy must be adhered to by all County Departments.

A. Travel Authorization

Elected Officials and Department Heads are to approve all travel and training for employees within their budget authority.

1. Commissioners are to approve all in-state and out-of-state travel and training for BOCC appointed Department Heads. Department Heads are to request approval from the BOCC prior to any travel or training.
2. The payment of registration fees for virtual trainings and for training and conferences within Yellowstone County only require a requisition and invoice when submitted to the Purchasing Department.

B. Meals and Lodging

All County officials and employees shall be reimbursed for meals and lodging when they are away from their designated work area and engaged in official County business in accordance with the following provisions. Travel status is identified as the period beginning with departure time, either from the employee's work area or personal residence and ending upon the return to either the employee's work area or residence. No meal allowance will be allowed for those meals included in the conference or registration fees. Employees need to try to obtain lodging at hotels accepting the state rate/government rate. No lodging will be paid for at hotels within Yellowstone County.

1. Within the State of Montana.

- a. Reasonable and necessary lodging expenses will be reimbursed at cost. All claims for lodging expense reimbursement allowed under this section must be documented by an appropriate receipt.
- b. Meal allowance reimbursement shall be based on the BOCC approved per diem rates and must include an overnight stay.
 - 1) Breakfast is allowed if in continuous travel status for more than 3 hours between the hours of 12:01 a.m. and 10:00 a.m.
 - 2) Lunch is allowed if in continuous travel status for more than 3 hours between the hours of 10:01 a.m. and 3:00 p.m.

- 3) Dinner is allowed if in continuous travel status for more than 3 hours between the hours of 3:01 p.m. and 12:00 p.m.

2. Outside the State of Montana.

- a. Reasonable and necessary lodging expenses will be reimbursed at cost. All claims for lodging expense reimbursement allowed under this section must be documented by an appropriate receipt.
- b. Meal Allowance reimbursement shall be based on the BOCC approved per diem rates and must include an overnight stay.
 - 1) Breakfast is allowed if in a continuous travel status for more than 3 hours between the hours of 12:01 a.m. and 10:00 a.m.
 - 2) Lunch is allowed if in a continuous travel status for more than 3 hours between the hours of 10:01 a.m. and 3:00 p.m.
 - 3) Dinner is allowed if in a continuous travel status for more than 3 hours between the hours of 3:01 p.m. and 12:00 p.m.

C. Transportation.

Transportation expenses shall be the most economical in terms of direct cost to the County and to minimize the employee's time away from the office.

1. Common Carrier Fares.

- a. Actual fares paid for air, bus and train transportation will be reimbursed with appropriate receipts. First class will not be allowed, only coach or similar fare will be reimbursed. Fees incurred upgrading seats within coach are not permissible, unless receiving written justification from elected official/department head.
- b. All commercial air travel shall be by the least expensive service available. Trips shall be scheduled to avoid unnecessary back tracking and overlapping. Employees are urged to compare standard airline ticket costs to those available at a discounted rate if they stay over a Saturday night, in which case the County will reimburse the additional night(s), meals and lodging.

2. Other Modes of Transportation

- a. County Vehicles - It is the policy of Yellowstone County that Motor Pool vehicles be used for official travel whenever possible. Reservations for use of Motor Pool vehicles are to be made through Facilities. Departments using Motor Pool vehicles will be charged at the rate currently allowed by MCA 2-18-503. All gasoline, oil and repairs will be charged on County credit cards or

accounts whenever possible. All cards and receipts will be turned in to the Facilities office when vehicles are returned. Repairs and damage to Motor Pool vehicles caused by misuse may be charged back to the using department and could result in cancellation of Motor Pool privileges.

- b. Personal Vehicles - Use of personal vehicles will be reimbursed at the rate currently allowed under MCA 2-18-503. If travel exceeds 1,000 miles in a calendar month, the reimbursement rate will be at \$.03 per mile less for all miles over 1,000. No gasoline, oil or repairs shall be reimbursed or charged to the County. No mileage reimbursement will be made in excess of the most economical airfare to the same destination.
- c. The current mileage rate reimbursed will be based on the standard mileage rates issued by the IRS.
- d. Any County employee using a personally owned vehicle for County business must carry at least the minimum liability/property damage insurance required by law.
- e. Travel by private airplane shall be paid only if cost effective compared to other travel arrangements, with consideration being given to the best utilization of employee time. Reimbursement will be at the State allowed rate.
- f. Rental vehicles are an allowable expenditure if more economical than other modes of transportation. A receipt must be turned in when requesting reimbursement for rental vehicles. Purchase of rental insurance is required, after receiving authorization from the Finance Department prior to the trip to make sure that coverage is only for any physical damage to the auto.
- g. Taxi and ride share transportation costs associated with non-business-related activities such as for travel for meals, social events, and personal pleasure shall not be reimbursed without prior **Department Head or Elected Official approval.**

D. Other Expenses.

- 1. Reasonable amounts paid for necessary other expenses, such as luggage fees for up to two check-in suitcases, airport shuttles, taxi cabs, and ride-sharing are allowable but must be verified by receipts.
- 2. Receipts for incidental items such as curbside baggage handling and public transportation are not required if total amount does not exceed \$10.00 per trip.
- 3. Fines of any type will not be paid or reimbursed by the County.

4. In the event an employee chooses to be accompanied by a spouse or family member, the lodging invoice must bear a notation signed by an authorized representative of the hotel/motel as to the single room rate, including appropriate adjustment on tax.
5. A reasonable amount will be allowed for tips, with tips on shared rides not to exceed 20% of an authorized expense, with receipts provided for reimbursement. Per Diem rates include tips; therefore, tips are not reimbursed in addition to meal per diem rates.
6. Only trips to and from the hotel, airport, and place of work activity will be reimbursable. Additional business-related travel on the trip must be documented and may be submitted for reimbursement after the trip has been completed.

E. Reimbursement Procedures

1. Travel Requests must be submitted for all travel other than routine monthly reimbursements. Amounts spent in excess of the maximum allowable rates will not be reimbursed.
2. All travel claims must be signed by the appropriate **Department Head or Elected Official** and have conference brochures or meeting agendas attached.
3. Travel claims must be submitted in a timely manner. No claims more than 90 days old will be reimbursed.
4. Whenever outside agencies reimburse a County employee for travel or related costs, and when such travel or related costs were borne by the County, the employee shall be required to remit the payment to the County within 5 working days after receipt of reimbursement. Failure to do so may result in disciplinary and/or legal action against the employee.
5. Failure to provide receipts (except for meal per diem) may result in forfeiture of travel payments.

F. Travel Advances

1. Travel advances may be requested on the Travel Request form. Requests must be signed by the appropriate **Department Head or Elected Official**. Checks for travel advances will not be issued for less than \$100.00. Travel advances for less than that amount must be obtained from a petty cash fund. Travel advances must be submitted at least ten days before travel. Advances will not be given more than thirty days before travel. If petty cash funds are available, out-of-town mileage and/or per diem for less than \$100.00 can be paid in advance prior travel. Travel advances for \$100.00 or more will be paid by county check by submitting a requisition and the appropriate documentation to the Purchasing Department. A Travel Request Form must be submitted for either type of payment when funds are requested. Any undocumented expenses may be denied.
2. All advanced travel payments must be accounted for, with required receipts, to the Auditing Department within 5 working days of the employee's return. Any unused

advance must be paid back to Yellowstone County. Failure to do so may result in disciplinary and/or legal action against the employee. Failure to provide adequate accounting may result in denial of all future travel payments to the employees department until the travel advance is accounted for properly.

G. Other

1. When more than one employee of the County is traveling to the same destination on the same day every effort should be made to coordinate the activities, such as car-pooling.
2. If an employee's travel compensation is governed directly by State law, State law shall apply if there is any conflict with the County Travel Policy.
3. Travel paid from either federal or state grants and/or contracts requires prior approval by grantor agency under the terms and conditions of the grant or contract.

H. Business Meal Reimbursement

The following meals are reimbursable at actual cost and must provide a receipt and an attached description of meeting purpose.

1. The main purpose of the meal is the active conduct of business, and business is actually conducted during the meal period, and there is more than a general expectation of deriving income or some other specific business benefit at some future time.
2. Meals officially scheduled as part of a business conference or convention (for those meals where the employee is required to pay for the meal).

Approved this 14th day of May, 2024 effective May 14th 2024. The Board of County Commissioners reserves the right to modify, amend or alter this policy.

ATTEST:

Board of County Commissioners
Yellowstone County, Montana

John Ostlund, Chairman

Jeff Martin
Clerk and Recorder

Mark Morse, Member

Date

Donald W. Jones, Member