



Title	Effective Date	Revision Date	No. of Pages
<p align="center">No. 305 STAFF TRAVEL AND CONFERENCE EXPENSES</p>	<p align="center">August 1, 1999</p>	<p>December 1, 2002 December 7, 2004 March 2, 2010 May 6, 2014 December 2018 September 2020</p>	<p align="center"><i>1 of 5</i></p>

It is the policy of the Tri-County Regional Centre for Education to reimburse staff members for ordinary expenses incurred while traveling to and/or attending approved school board functions.

PROCEDURE under Policy No. **305**

The Tri-County Regional Centre for Education recognizes its responsibility to reimburse staff members for ordinary expenses incurred while traveling to and/or attending functions, meetings, conferences, professional development and job related Regional Centre for Education business. Expenses associated with the following activities will qualify for reimbursement:

- Meetings called or authorized by senior administrators.
- In-services, seminars, program planning/evaluation meetings, visits to schools, conferences, and meetings with the Nova Scotia Department of Education and Early Childhood Development or other external agencies.
- Meetings of school community organizations where the presence of the employee has been specifically requested by the Regional Executive Director or designate.
- Travel and expenses which are sanctioned through the provisions of specific job descriptions.
- Provisions of the collective agreements will prevail insofar as they are applicable to staff travel.

1. General

Staff members are encouraged to pay all expenses themselves and submit an expense claim for reimbursement. If the staff member prefers, accommodations, conference registrations and vehicle rentals can be direct billed to TCRCE.

Staff members of the Tri-County Regional Centre for Education shall be reimbursed by direct deposit.

Travel between the residence of the employee and his/her designated office or worksite shall not be reimbursed. It is the responsibility of the employee.

2. Meal Allowances

- a) The amounts that can be claimed for meals (without a receipt) are the actual amounts expended up to the specified maximum. Claims are to include the meal cost, taxes and gratuities.

PROCEDURE under Policy No. **305** cont'd

Maximum amounts of these claims are:

1. Breakfast \$ 8.00
2. Lunch \$ 15.00
3. Dinner \$ 20.00

Actual and reasonable expenses may be reasonably reimbursed when staff members are placed in situations where a meal is above the per diem rate. In such cases all applicable original receipts are to be attached to the claim form.

- b) Meal expenses within the Regional Centre for Education boundaries will not normally be authorized except for working business meals with business associates or other Regional Centre staff
- c) The cost of breakfast may only be claimed when the employee has been traveling on Regional Centre business overnight or travelling for more than one hour before the recognized time for the start of the day's work.
- d) The cost of the evening meal may only be claimed when the employee is traveling on Regional Centre business and is not expected to return to his/her residence for more than two hours after the recognized time for the end of the day's work.
- e) Meals should not be direct billed to the TCRCE

3. Expenses Not Eligible for Reimbursement by the Regional Centre for Education

- a. Meals that are provided or included in a conference registration fee
- b. Meals that are provided or included in a meeting
- c. Alcohol Beverages
- d. Movie rentals
- e. Dry cleaning
- f. Personal telephone calls (including those on TCRCE cell phones).
- g. Parking fines or traffic violations
- h. No gratuities may be claimed separately, as they are provided for in the per diem allowances
- i. Kilometrage not related to Regional Centre business
- j. Any other personal expenses not listed above
- k. Any other expenses not deemed reasonable

4. Lodging and Associated Expenses

While travelling on Regional Centre for Education business, due regard must be given to frugality/economy when booking accommodations. The use of luxury accommodation is not permitted and will not be reimbursed. When planning trips, staff members should normally stay at establishments offering preferred discount rates. It is the responsibility of the staff member to identify himself/herself as a Regional Centre for Education staff member in order to ensure that the preferred rate for commercial accommodation is provided.

PROCEDURE under Policy No. **305** cont'd

Cancellations and Guaranteed Reservations

When travel plans change and the accommodation will not be required, the staff member shall ensure that reservations are cancelled directly with the commercial establishment(s). Proof of cancellation shall be obtained (i.e., cancellation number and agent's name).

Private Accommodations

Where a staff member is required to be away overnight on Regional Centre for Education business and they use private accommodations, the staff member may be reimbursed to a maximum of \$25 per night. Private accommodation is not an establishment that is in the business of providing daily lodging to the public.

Lodging and Registration Arrangements

Arrangements for lodging and conference registration can be made by staff at the Regional Centre for Education Office.

Hotel Charges

It is the staff member's responsibility to review the hotel charges and to question charges that were not authorized, or where the amount is incorrect. Expenses that may be claimed include but are not limited to:

- a. Room rental
- b. Parking fees (receipts required over \$15.00/day)
A staff member in travel status may claim parking expenses for:
 - short-term parking when on Regional Centre for Education business
 - overnight parking when not provided with accommodation
 - parking at an airport or other transportation terminal (if it is less costly than access via limousine, bus, or taxi)

Staff members will use free parking, when available and metered parking in preference to lot parking if the expected duration of parking is within the time permitted. Fines for overtime parking are not an allowable expense.

- c. Internet fees
- d. Taxi fares (receipts required over \$10.00/day)
- e. Toll fees (receipts required over \$10.00/day), such as ferries and toll highways

5. Travel Expenses

- a. Staff members must submit an expense claim form for kilometrage related to use of their personal vehicle for Regional Centre for Education business.
- b. Effective April 1 of each year, the mileage rate will follow the provincial rate for all thresholds and will be automatically implemented when the provincial rate is changed.. The following thresholds apply to TCRCE employees:

PROCEDURE under Policy No. **305** cont'd

Kilometers Driven	Rate
0 – 16,000 km	As per the provincial rate
16,000.1	As per the provincial rate

- c. Expenses for kilometerage will be calculated according to the most direct or expeditious route.
- d. Staff members using their privately owned vehicle must maintain adequate automobile insurance coverage, a valid drivers license and car registration.
 - The Regional Centre for Education assumes no financial responsibility for the payment of insurance premiums.
 - The Regional Centre for Education assumes no responsibility for the deductible amounts related to comprehensive or collision coverage.
 - The Regional Centre for Education assumes no responsibility for damages to the staff member's vehicle while on Regional Centre for Education business.
- e. All receipts must be attached showing the detail of what was purchased and that payment was made (per diem meal claims is an exception) For example, on-line purchases, such as airfare must include the invoice detail and must show that payment was made by including the credit card receipt or statement.
- f. Claims for such items as airline flights, train travel, etc. must include the itinerary with the staff member's name, with dates of travel, purpose of travel, to and from, etc.
- g. Approval for travel outside Canada is to be provided by the Regional Executive Director (or designate) before any travel may take place.

Employees who use their own vehicle on the employer's business shall be paid at the Regional Centre for Education rate for kilometerage over and above those kilometers they normally incur to travel from and to their residence and their base work location. Kilometers will be calculated using the most direct or expeditious route. Examples include:

- i) If an employee travels a total of 150 kilometers in a day, of which 30 kilometers is the distance to and from home (15 kilometers each way), they would be entitled to be compensated for 120 kilometers (as long as this is all related to the employer's business and it is the most direct or expeditious route).
- ii) If the same employee goes to their base work location in the morning and later that day travels 50 kilometers to a business meeting and returns to work alter that day but decides to take a scenic route (during their lunch hour) that requires a trip of 65 milometers, they would be entitled to be compensated for 100 kilometers (as the return trip was not the most direct or expeditious route).
- iii. If the same employee goes to their base work location in the morning and later that day travels 10 kilometers to a business meeting and then leaves that meeting and travels 8 kilometers to home at the end of the day, they would be entitled to be compensated for 3 kilometers.

PROCEDURE under Policy No. **305** cont'd

6. Rental Vehicles

- a. When practical, economical and safe (depending upon weather conditions) a staff member should first consider the use of a rental vehicle.
- b. Any fuel charges for the rental vehicle (not already invoiced by the rental company) are to be paid by the staff member and then submitted on a TCRCE Expense Claim Form for reimbursement.
- c. Where reasonable and practical, compact-sized vehicles shall be rented. Full-size or specialty vehicles may be used only when warranted by:
 - the number of passengers to be carried
 - the bulk or weight of the goods to be transported
 - an extenuating circumstance, such as hazardous weather conditions

The Car Rental Form **MUST** be faxed to the rental company and to the Finance Department.

7. Travel & Expense Claim Form

- a. Before an Expense Claim Form is submitted for payment, the following must be verified by the staff member:
 - All calculations are accurate. Incorrect claims may be returned to the staff member for recalculation and resubmission.
 - The correct accounts (GL, Cost Center, Fund and Functional Area) are assigned.
 - The correct vendor # is included on the claim (this may be obtained from accounts payable staff).
 - All original itemized receipts are attached. Debit and credit card slips are not sufficient as they are not itemized receipts.
 - The claim has been signed and dated by the staff member.
 - The claim has been approved by the staff member's supervisor.
- b. When and where to submit claims:
 - Expenses incurred by a staff member for TCRCE business must be submitted on an approved expense claim form and submitted to the staff member's supervisor.
 - The supervisor is responsible to review the claim and ensure it complies with this policy. If in accordance with this policy, the supervisor shall approve it and forward it to the Finance Department.
 - Only original Expense Claims will be accepted, faxed or scanned forms will not be accepted for processing.
 - Staff members are to submit their Expense Claim Forms on a **monthly** basis.

PROCEDURE under Policy No. 305 cont'd

- c. Review by the Director of Finance or designate:
- The Director of Finance or designate shall bring issues relating to staff members expense claims to the attention of the supervisor who approved the claim, or to senior management for resolution.

At year-end all expenses must be submitted (with receipts) with a deadline of the 2nd Friday of April as the last day of submission for the previous fiscal year. Claims made after this date for previous fiscal year's expenses may not be accepted.

8. Credit Cards

Staff members who have been issued a Regional Centre for Education credit card shall provide Accounts Payable staff within 3 business days of receiving the monthly credit card statement with the following:

- a) The credit card statement with original receipts attached for all changes, and
- b) Each original receipts must provide details of what the expenditure was for, and
- c) Each receipts must be coded to the proper account information, and
- d) Each receipts must be signed by appropriate budget manager, and
- e) Each receipt related to a staff member's travel expenses must be signed by their supervisor.

9. Forms

The following forms can be found on the Tri-County Regional Centre for Education's Website.

- Employee Expense Claim Form
- Hotel Room Authorization Form (if the room is to be direct billed to the Regional Centre for Education, this must be faxed or emailed to the hotel and the Finance Department.
- Vehicle Rental Form if the vehicle is to be direct billed to the Regional Centre for Education, this must be faxed or emailed to the rental company and the Finance Department.