



Employee Travel – draft April 2023

Purpose:

The purpose of this policy is to establish uniform guidelines for employee travel. This policy is intended to reflect Gaston County's (County) commitment to being good stewards of financial resources while traveling on official County business. Partnering agency representatives or volunteers traveling at the request of the County are also covered by this policy.

Policy:

Employees are expected to be good stewards of County funds and use good judgment when making travel plans. Department Directors are responsible for managing the department's travel expenditures and available funding. All travel requires pre-approval, and all travel requests and reimbursements shall be submitted using the Travel Authorization and Travel Expense Reports. Employees should use the most economical mode of transportation with consideration given to time constraints, productivity, and distance traveled and be able to justify all expenses with supporting documentation. The County will only pay expenses necessary to conduct County business. The preferred method of payment for travel related expenses is a Procurement Card (P-Card). If an employee chooses to pay out of their own pocket, the County will reimburse the employee upon submission and approval of the final Travel Expense Report. If family members or guests accompany an employee, the County will not pay their travel expenses. The accompanying procedures and appendices will provide additional information that will assist employees with travel-related questions. Gaston County is committed to the fair and equal employment of people with disabilities. Accommodations will be provided to qualified individuals with disabilities when such accommodations do not impose an undue hardship and when such accommodations are directly related to performing the essential functions of a job or to enjoy equal benefits and privileges of employment.

1. In-County or Local Travel:

- a. Registration Expenses
 - i. Registration for events shall be handled by P-Card, through accounts payable, or as a reimbursement on the final Travel Expense Report.
- b. Mileage Reimbursement
 - i. Employees will be reimbursed for the use of their personal vehicles on County business within the County at the prevailing mileage rate defined by the Internal Revenue Service (IRS). Use of County vehicles is not eligible for mileage reimbursement.



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- ii. Mileage reimbursement will be paid based on the mileage from office location to travel destination. Commuting mileage, (home to office/job location) is not included in mileage reimbursement. Documentation of the purpose of travel and actual miles traveled will be supported by odometer readings for In-County travel on the Travel Log. For local travel outside the County, mileage will be supported with Google maps and provided with the Travel Expense Report.
 - iii. Use of a County vehicle is encouraged, if available. Please refer to the County's Vehicle Policy for more information.
 - iv. Employees who receive an automobile or travel allowance are not eligible for reimbursement for miles driven within the County.
 - c. Meals
 - i. Meal expenses are not eligible for reimbursement.
 - d. Lodging
 - i. Lodging expenses are not eligible for reimbursement.
- 2. **Out-of-County Travel with Overnight Stay:** All Out-of-County travel with overnight stay requires approval by the authorizing party via Travel Authorization prior to the date of travel and before any travel-related purchases are completed. Once the trip is complete, the employee will have ten (10) business days to reconcile all business-related expenses and submit the Travel Expense Report for approval.
 - a. Registration Expenses
 - i. Registration for events will be handled by either P-Card, through accounts payable, or as a reimbursement on the final Travel Expense Report.
 - b. Lodging
 - i. Lodging may be paid using a County P-Card, by check, or reimbursed on the Travel Expense Report.
 - ii. The County will pay for the minimum number of nights required to conduct County business at the hotel's single occupancy rate.
 - iii. If an employee is attending a conference, every effort should be made to obtain a room at the conference hotel. If an employee chooses to stay at a hotel other than the conference hotel, they will be reimbursed only up to the conference hotel's rate.
 - iv. If travel is not related to a conference or the conference hotel is not available, an employee should use the General Services



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Administration (GSA) lodging rates for the overnight location to assist in determining a reasonable lodging rate.

- v. Employees will not be reimbursed for any voluntary hotel amenity charges (e.g., laundry, spa treatments, room service, etc.).
 - vi. If driving a personal vehicle is the most economical mode of transportation, the County will reimburse the parking fees charged by the hotel for self-parking only, unless valet parking is the only option. If the employee chooses to drive a personal vehicle and it is not the most economical mode of transportation, hotel parking fees will not be reimbursed.
- c. Transportation: Employees are expected to use the most economically feasible mode of transportation, giving consideration for time constraints, productive hours, and distance involved. If an employee uses a more expensive option, the reimbursement will only be equivalent to the least expensive option. Documentation must be included with the initial Travel Authorization and final Travel Expense Report.
- i. Air Travel
 1. Air travel may be paid for on a County P-Card authorized for travel or paid for by the employee and included with the Travel Expense Report following the trip.
 2. Employees should book flights with the major commercial airlines (American, Delta, JetBlue, Southwest, United) flying out of Charlotte Douglas International Airport (CLT).
 3. Flights will be reimbursed at no more than the main cabin rate. Employees shall not book commercial airlines' basic economy fare for business travel due to the ticket restrictions.
 4. Employees should not purchase voluntary amenity services (extra leg room, upgrades, priority boarding, flight insurance, in-flight movie rentals) with County funds.
 5. Airline change fees are not permitted unless a specific business case is identified, documented, and approved prior to the airfare change.
 6. Parking at CLT will be reimbursed at a rate not to exceed the prevailing Long-Term parking rate. In lieu of parking at the airport, transportation to and from the airport (taxi, rideshares) is reimbursable up to the total of the Long-Term rate for the business trip.



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7. Mileage to/from airport – Per IRS guidelines, if an employee leaves for the airport from their office location, mileage is reimbursable.
 8. Travel to/from airport to hotel – Utilize hotel/airport shuttles or public transportation where applicable, keeping in mind employee safety is of the utmost importance.
- ii. Rental Cars
1. Employees shall select an economy class car when booking a reservation.
 2. The use of a rental car requires business justification included with the initial Travel Authorization. When justifying the use of a rental car, the employee shall include documentation of the cost of hotel parking and related expenses (parking, fuel, tolls, taxes etc.).
 3. If a rental car is used partially for personal use, the cost must be allocated between business and personal use, and the personal cost is not reimbursable.
 4. It is recommended that employees opt for additional insurance coverages offered by the car rental company.
 5. The costs of rental car add-ons (e.g., GPS, satellite radio, roadside assistance, etc.) will not be reimbursed.
 6. Employees should refuel prior to returning the vehicle and itemized receipts are required for reimbursement.
 7. Fines for parking violations, moving violations, and speeding tickets are the responsibility of the employee and will not be reimbursed by the County.
- iii. Passenger Train Service
1. Employees will be reimbursed for passenger train tickets in business class for business travel. Employees are expected to use the most economically feasible mode of transportation giving consideration for time constraints, productive hours, and distance involved.
- iv. Taxi, Rideshares
1. Tips – Up to \$5.00 or 20%, whichever is less, is reimbursable.
 2. Any additional transportation costs that are not sufficiently supported with documentation of a business reason will not be reimbursable (e.g., rideshare to dinner that is not business related).



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d. Mileage

- i. Employees will be reimbursed for the use of their personal vehicles on County business at the prevailing mileage rate defined by the IRS.
- ii. Mileage reimbursement will be paid based on the mileage from office location to travel destination, supported with Google maps. Commuting mileage, (home to office/job location) is not included in mileage reimbursement.
- iii. Use of a County vehicle is encouraged, if available. Please refer to the County's Vehicle Policy for more information.

e. Meals and Incidentals

- i. Employees will be reimbursed on the GSA per diem rate for meals and incidental expenses incurred during the business portion of travel. This rate is calculated based on the travel destination and can be found [here](#).
- ii. On the first and last day of travel, eligible reimbursements include 75% of the per diem rate. This number can be found on the GSA per diem worksheet.
- iii. For any meals provided by the conference (including continental breakfast), the equivalent per diem must be deducted from the Travel Expense Report. If dietary needs cannot be accommodated by the conference, this must be supported in the documentation submitted for reimbursement. A copy of the conference agenda is required as supporting documentation.
- iv. P-Card purchases for meals are not allowed and shall be reimbursed by the employee.
- v. Incidental expenses are defined by the GSA as: Fees and tips given to porters, baggage carriers, and hotel staff. These tips are included in the daily per diem and will not be reimbursed over that amount.

f. Advances

- i. Travel advances will be issued for per diem only. Employees are eligible to receive an advance if per diem amounts meet or exceed \$150.



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- ii. Advances should be requested no later than ten (10) business days prior to travel. Finance will issue advances no sooner than one (1) day prior to the travel departure date.
 - iii. Exceptions will be reviewed on a case-by-case basis, with final approval delegated to the Finance Director.
 - iv. Travel advances are required to be reconciled on the Travel Expense Report as part of the final travel reimbursement request.
- 3. Unauthorized Expenses:** If any expenses are found to be unauthorized or not allowed, the employee will be fully responsible for those charges. Alcohol and any personal expenditures will not be reimbursed by the County. Any expenses without sufficient documentation or business justification may be the responsibility of the employee. If an advance was provided that was more than the final approved expenditures, the employee must reimburse the County within ten (10) business days of notification. If the employee cannot reimburse within this timeframe, the Finance Department will initiate a payroll deduction for the balance owed.
- 4. Penalty for Abuse of Travel Privileges:** Employees who abuse travel privileges shall be subject to disciplinary action, up to and including termination, as deemed appropriate by the Department Director, with input from Human Resources. Repeat offenders may have travel privileges revoked. Abuse of travel privileges includes, but is not limited to the following:
- a. Falsification of travel documentation or requests for reimbursement.
 - b. Submission of requests for reimbursement of expenses not determined to be related to the purpose of travel.
 - c. Use of County vehicles for transportation not related to the purpose of travel.
 - d. Personal misconduct while traveling, as defined in the Gaston County Personnel Policy Manual.

Responsibilities:

Finance Department Responsibilities:

- 1. Review all travel reimbursement requests for proper approvals, accuracy, sufficient documentation, and compliance with this policy.
- 2. Approve or deny reimbursement requests based on review in item one (1) above.



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3. Once reimbursement has been approved, submit payment for processing. Finance will process payments within ten (10) business days.
4. Work directly with Department Directors to reconcile travel discrepancies.
5. Initiate the process to recover outstanding balances due from an employee to the County via payroll deduction, if necessary.

Department Responsibilities:

1. Department Directors are responsible for approval of all travel-related expenses for their respective department based on business needs.
2. Ensure that all department travel expenditures are based on business needs and that there is available funding in compliance with this policy.
3. Ensure travel planning is done well in advance of travel, when possible, to ensure the lowest cost to the County.
4. If travel is related to a grant, ensure there are no specific restrictions included in the grant agreement.
5. Ensure that overnight travel is limited to events from which the County will derive a specific benefit from attendance.
6. Ensure that all required documentation and business justifications are included with the travel authorization and expense reports when authorizing travel and upon reimbursement request.
7. Ensure that all expenditures are correct and are appropriately charged to the correct object code in the financial system.
8. Assist Finance with resolving outstanding advance reconciliations prior to the initiation of a payroll deduction.

Definitions:

1. Authorizing Party: An individual authorized to approve or disapprove travel requests, cash advance requests, or travel reimbursement requests as designated by the Department Director. Department Directors are the authorizing party for all out-of-state travel. The authorizing party for Department Directors is the County Manager or designee.
2. GSA: A Federal agency that provides policies and tools to promote efficient travel planning.
3. IRS Mileage Rate: The standard reimbursable mileage rate, as defined by the IRS. This is the rate at which mileage will be paid to employees related to business travel.
4. Local travel: Travel outside of the County, yet within a reasonable driving distance that an overnight stay is not reasonable or justifiable.



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5. Per Diem: a fixed allowance for lodging, meals, and incidental expenses incurred while on official County business.
6. Requesting Party: A County employee who will be advanced or reimbursed for travel costs incurred while conducting County business.
7. Travel Authorization: The County form used to request travel (formerly Travel Request). The authorization should be completed prior to making travel-related purchases.
8. Travel Expense Report: This form is completed as a part of the post-trip reporting process. Employees will reconcile advances and submit reimbursement requests on this form.
9. Travel Log: The form used by employees to collect mileage driven related to In-County travel. The date, odometer readings, and purpose of the trip should be included on the log.

Related Policies

Gaston County Personnel Policy

Procurement Card (P-Card) Policy and Procedures Manual

Vehicle Policy