

**Internal Policies and Procedures
of the
Utah State Board of Education**

Policy #	01-02
Subject	Travel Requests and Expense Reimbursements
Date	10/10/2024
Policy Owner	Assistant Superintendent of Operations
Policy Officer	Deputy Superintendent of Operations

The Utah State Board of Education will be following Utah State Travel Policy 10-1 through 10-17 and Utah State P-card Policy 21-1 through 21-2. The additions and exceptions listed under each Utah State Travel hyperlink are the USBE’s more restrictive or additional policies.

Purpose: The Utah State Board of Education (“USBE”, “Agency”) has adopted these Travel and Expense Reimbursement Policies and Procedures (“policies” and “procedures”) to ensure that travel and other expenses incurred by USBE’s employees, board members, and others (collectively referred to as “travelers” throughout this policy) who incur expenses in relation to USBE employment or business, are:

- Consistently requested, documented, and approved;
- Related to USBE reasonable and appropriate business purposes only; and
- Processed utilizing a consistent and well-controlled process.

Scope: These policies apply to all employees, board members, and others (“travelers”) who incur travel or other expenses on behalf of the USBE for business-related purposes. In order for any expense to be reimbursed, it must be requested, documented, and approved in accordance with the detailed policies and procedures described below.

Throughout this document, words like “must” and “should” are used. When the term “must” is used, no group or individual has the authority to deviate from the specific policy or procedure. The term “should” is used to convey that individuals are expected to follow the policy and procedures as written and are required to justify any deviations. Deviations should only occur when the specifics of the situation justify a reasonable departure from the recommended policy and procedures.

--	--

Definitions:

The definitions below define standard wording referred to throughout the USBE Policies and Procedures and apply to all instances where a word/phrase is used.

- **Booking Tool/Trip Search**: A tool located within Concur used to reserve airfare, lodging, and rental vehicles.
- **Conference**: A meeting, retreat, seminar, symposium, or event that involves USBE employee travel. It also applies to training activities that are conferences.
- **Personal Time**: All time traveling outside of official state business (before, during or after) – defined by the business travel requirements.
- **P-Card**: A state issued purchasing card that may be used for payment of official state business travel expenses, such as lodging or rental cars, with the exception of meals.
- **Travel Intake Form**: An online form used to gather information and notify the travel team of upcoming travel.
- **Traveler**: For purposes of this policy, “traveler” means any person (USBE employee, board member, State employee or non-state employee) who is traveling on behalf of USBE business and being reimbursed for travel expenses.
- **USBE Financial Operations**: The section at USBE responsible for accounting and financial functions.
- **USBE Master Membership Conference Spreadsheet**: A master list of all conferences and memberships approved by superintendency prior to travel.
- **USBE Purchasing**: The function within the Financial Operations Section that manages the purchasing function.
- **USBE Travel Coordinator**: USBE Budget Officers who have been designated by USBE Financial Operations to have certain approval authorities and responsibilities in the travel and expense reimbursement process, as defined in this policy.
- **USBE Travel Team**: Consists of USBE Budget Officers and Travel Specialists within Financial Operations.

Travel policy

State Policy 10-1: Who should book travel through the contracted travel agency

USBE follows state policy 10-1

State Policy 10-2: Requirements for agency travel policy

USBE follows state policy 10-2

State Policy 10-3: Accommodating employees with disabilities

USBE follows state policy 10-3 with the following addition(s):

- The USBE travel team will be provided a list from HR of employees that have approved accommodations and their specific policy being exempted.

State Policy 10-4: Travel Requests

USBE follows state policy 10-4 with the following addition(s):

- For all overnight travel, the traveler will complete the USBE travel intake form.
- For out-of-state travel, the initial request should be submitted and through all Concur approvals at least 45 days prior to the date of travel to allow for the approval and travel scheduling process to occur. Any requests **not** submitted within the timeline requirements of this policy may require an Assistant Superintendent's approval. This approval will be obtained by the travel team.
- The USBE Master Membership Conference Spreadsheet must have all conferences and employees attending on it. This will act as the multi-traveler approval and coding approval.
- Travelers are responsible for notifying the USBE travel team of any changes or cancellations to their itinerary/travel plans. With the coordination of the USBE travel team, the traveler or team member will cancel or change the needed reservation.

USBE follows state policy 10-4 with the following exception(s):

- The USBE travel team will enter all overnight requests in Concur.
- A-2, B-4, and B-4a – USBE requires an in-state overnight travel request, and this will serve as the written approval from their supervisor. In-state overnight travel requests must be fully approved in Concur prior to travelers' departure.
- E-1 – The USBE travel team will mark the original request as closed

State Policy 10-5: Cash advances for business travel

USBE follows state policy 10-5 with the following exception(s):

- A-2 – Travelers are eligible for up to a 90% travel advance for lodging and meal expenses only.

State Policy 10-6: Reimbursement requests

USBE follows state policy 10-6 with the following exception(s):

- The USBE travel team will enter all overnight expenses in Concur.
- B-1a – USBE will require an itemized receipt for any rideshare reimbursements.
- F-2 – USBE will require this in the form of an exception memo.

State Policy 10-7: Meals and incidental expenses

USBE follows state policy 10-7 with the following addition(s):

- A-3b – Must follow the accommodations policy 10-3.
- In-state day trip (non-overnight): While formal documentation of the travel request and approval process is not required, travelers are required to inform their supervisor of the travel prior to the date of travel. The supervisor's approval for day travel will be documented after the travel is complete during the Travel Expense Report process.
- Local parking expenses for in-state business may be reimbursed, excluding valet parking, if a receipt is submitted.

State Policy 10-8: Lodging

USBE follows state policy 10-8 with the following exception(s):

- USBE travelers will not be allowed to use the Concur booking tool/trip search.

State Policy 10-9 Use of personal vehicles for state business

USBE follows state policy 10-9 with the following addition(s):

- If a claim or an accident occurs during USBE business, regardless of the type of vehicle (State, rented, or personal), the employee must immediately notify the Utah Division of Risk Management at 801-957-7170 or <https://risk.utah.gov/contact-us/>.
- Mileage reimbursements should be submitted through Concur monthly.

USBE follows state policy 10-9 with the following exception(s):

- B-2 – USBE will require a drive vs. fly cost comparison, and this will be created by the USBE travel team.
- D-1 – When traveler takes a privately owned vehicle 100 miles or more in a day, in lieu of using a State fleet or rental vehicle, reimbursements will be limited to the **lower cost** of driving a personal vehicle or renting a compact car, according to the cost comparison found

at this link: <https://finance.utah.gov/cost-comparison-for-short-term-vehicle/>. Employees are still encouraged to take fleet or Enterprise vehicles, as personal vehicles take on the insurance risk by the traveler.

State Policy 10-10: Rental Vehicles

USBE follows state policy 10-10 with the following addition(s):

- If a claim or an accident occurs during USBE business, regardless of the type of vehicle (State, rented, or personal), the employee must immediately notify the Utah Division of Risk Management.

USBE follows state policy 10-10 with the following exception(s):

- USBE travelers will not be allowed to use the Concur booking tool/trip search.
- A-1 – Out-of-state rental requires approval in writing from an Assistant Superintendent or above.
- A-4 – Travel request must state the business need for any vehicle other than compact.
- D-2a – USBE travelers are not allowed to choose the prepaid fuel option when renting a vehicle.

State Policy 10-11: Air travel

USBE follows state policy 10-11 with the following addition(s):

- With approval by the Assistant superintendent through email from the travel team, travelers may request to stay an extra night at the conference location and return home the next morning if there isn't a returning flight that arrives at a reasonable hour. Travelers will be expected to take the first reasonable flight the next morning. If they choose to stay later it changes the overnight stay to personal time and the traveler will be responsible for lodging, meals, additional flight costs, and extra airport parking.

USBE follows state policy 10-11 with the following exception(s):

- USBE travelers will not be allowed to use the Concur booking tool/trip search.
- A-1a – Tickets will be purchased by only the USBE coordinator on a state lodge card. No traveler is allowed to book their own airfare.
- A-2 – USBE will require a cost justification. The traveler will need to provide this justification.
- E-2 – USBE will allow one bag reimbursement each way.

State Policy 10-12: Ground transportation

USBE follows state policy 10-12 with the following exception(s):

- C-1 – USBE will require an itemized receipt for all ground transportation reimbursements.

State Policy 10-13: Conference and training registration fees

USBE follows state policy 10-13 with the following addition(s):

- The approved USBE Master Membership Conference Spreadsheet will serve as written permission from the supervisor, (this assumes there is registration cost). If it's not on the list, the employee must follow the process to have it added to the list.

USBE follows state policy 10-13 with the following exception(s):

- B-1a – The in-state overnight travel request will serve as the written approval from their supervisor for conferences and trainings.
- C-1 – If there is an overnight stay associated with the training or conference, then a travel request needs to be approved first.
- C-2 – Registration cannot be paid until the travel request is approved in Concur.
- C-2a – The only p-cards that can be used for another traveler's registration are held by the Purchasing Section or Executive Administration.

State Policy 10-14: Parking

USBE follows state policy 10-14

State Policy 10-15: Adding personal travel days to a business trip

USBE follows state policy 10-15 with the following exception(s):

- A-1 – Personal time needs to be identified prior to the travel request being entered in Concur. This needs to include the dates, times and specific flights that include the personal time. Once your flight is booked with personal time, flights will not be able to be changed.
- C-2b – The USBE travel team will create a cost comparison.

State Policy 10-16: Reimbursement by a third party

USBE follows state policy 10-16 with the following exception(s):

- B-2.2b – USBE will invoice the traveler for the amount exceeding travel policy and USBE will pay the third party.
- B-2c, 2d – After the trip, the USBE travel team will attach the needed documents and close out the travel request.

State Policy 10-17: Exception requests

USBE follows state policy 10-17

P-card policy

State Policy 21-1: P-card general policies and procedures

USBE follows state policy 21-1 with the following exception(s):

- B-1 – The USBE Purchasing Section will provide the small purchase training for the p-card applicant.
- F-3 – Travelers must provide itemized receipts for all travel expenses put on p-card.
- F-6c – The only p-cards that can be used for another traveler’s registration are held by the Purchasing Section or Executive Administration.

State Policy 21-2: P-card reconciliation

USBE follows state policy 21-1 with the following exception(s):

- C-2 – Travelers may not use the missing receipt affidavit for any travel purchases on p-card.