

EFFECTIVE JULY 1, 2019

Welcome! This guide is to help JCPS employees better understand the travel reimbursement process.

GENERAL TRAVEL RULES

REASONABLE AND NECESSARY EXPENSES (JCBE POLICY 03.125)

JCPS will reimburse individuals traveling on official Board business for reasonable and necessary expenses incurred with appropriate documentation. Our primary responsibility is to promote student achievement. This should be at the heart of every decision, including travel. **JCPS understands that exceptions may occur regarding travel.** Every effort should be made to get travel approved in advance. Please contact [the appropriate department](#) for clarification or questions.

TRAVEL PREAPPROVAL – PROFESSIONAL LEAVE FORM

Plan ahead! Get your travel approved 30 days prior of the event date by your direct supervisor by using a Professional Leave Form with original signatures. If the travel is funded by a grant, the grant director will need to approve as well. This form must be completed for all out-of-county travel reimbursement and for teachers requesting a substitute due to travel. No more than six (6) teachers or employees from one site will be approved on the same day without prior approval from the Chief of HR. Teachers are allowed a maximum of 5 days professional leave per calendar year.

CERTIFICATION OF ACCURACY ON EXPENSE REPORTS

By signing the travel reimbursement request, the traveler is certifying the accuracy and legitimacy of all travel information. The signature of the traveler's supervisor certifies that they agree that the travel was necessary and the requested reimbursements are proper. All signatures must be original. Administrators may not approve their own travel reimbursements. **Anyone incurring expenses without proper authorization may be personally liable for all expenses.**

EXPENSE REPORT SUBMISSION DEADLINE

Requests for reimbursement *should be* submitted no later than 20 work days after the completion of travel. For in-county travel, this means it should be submitted no later than 20 work days after the last day of the month. All travel through June should be submitted by July 5th. This submission deadline decision is at the discretion of each department/school site based on factors such as budget, staffing, etc.

NOTE: JCPS assumes no obligation to reimburse employees for expenses that are not in compliance with these guidelines. Employees who do not comply with JCPS Travel Guidelines may be subject to delay or withholding of reimbursement. Disregard for these guidelines may result in disciplinary action up to and including termination.

EVENTS IN LEXINGTON, KENTUCKY

Travelers should be particularly mindful of when overnight stay in Lexington is necessary. In most cases, travelers should commute daily, as the cost is significantly less than overnight stay.

SPECIAL VENUE RESTRICTIONS

Travel requests Alaska, Hawaii, or international destinations must be reviewed and approved by the Cabinet and the Superintendent. Travel requests to these venues must include a statement clearly explaining the benefits of the travel to the students of Jefferson County.

MILEAGE REIMBURSEMENT

TRAVEL BY AUTOMOBILE

Mileage claimed should be the actual mileage via the most direct route (shortest distance or time). When traveling between non-JCPS locations, indicate the purpose of that travel on the voucher. Reimbursement is limited to mileage in excess of normal commute miles unless the required trip is outside of regular business hours or that employee’s working calendar. When an employee starts or ends their travel at home, deduct the employee’s normal commute from home to their primary work location from the total mileage submitted for reimbursement, and an internet map shall be provided to document the miles being deducted. If applicable, indicate round trip (“RT”) on the travel voucher.

If an employee is found to have claimed excessive mileage for any reason, that employee may be mandated to provide internet maps for all future reimbursed mileage.

As of July 1, 2019, reimbursement for personal automobiles is **\$.42 per mile** as established by the Kentucky Revenue Cabinet.

IN-COUNTY TRAVEL

What to submit: [In-County Travel Voucher Form](#) and any applicable original receipts (parking, etc.)

Intra-day travel to Frankfort for JCPS business, or to any Kentucky Department of Education (KDE)-sponsored event held in Kentucky, will be considered in-county travel.

OUT-OF-COUNTY TRAVEL

What to submit: [Out-of-County Travel Voucher Form](#) and applicable documentation (detailed below)

| WHAT YOU NEED REIMBURSED: | WHAT DOCUMENTATION IS REQUIRED: |
|--|---|
| Registration Fees | Professional leave form, receipt/invoice |
| Hotel | Professional leave form, agenda, receipt/invoice, three-quote D&F (if not conference/overflow hotel – see pg.3) |
| Mileage out of District | Professional leave form, map, agenda |
| Meals (overnight trips only) | Professional leave form, agenda, hotel, air itinerary with start/end times or if driving, drive times |
| Incidental Expenses (parking, ground transportation, one checked bag, etc.) | Professional leave form, actual receipts, agenda |
| Airfare | Professional leave, actual receipts, agenda, three-quote D&F |

REGISTRATION FEES

Registration fees are allowed in the amount necessary to qualify individuals to attend conventions, meetings, conferences, etc. These can be purchased via a PO or a reimbursement voucher.

AIR TRAVEL

Employees should book airfare as soon as their trip is approved, which will generally result in lower cost than closer to the trip dates. **Once booked, airfare may be submitted for reimbursement without waiting until the trip is complete.** Fares must be booked in coach/economy class with a common carrier. Employees who obtain a nonrefundable ticket and subsequently do not use the ticket will be liable for the cost of the airline ticket.

Reimbursement for transportation will be limited to the [lesser of either the cost of flying or driving](#) via the mileage reimbursement rate.

HOTEL/LODGING

Hotel arrangements may be requested at least three weeks in advance to be paid by purchase order (with approved professional leave form and an invoice/cost recap attached) or may be requested as reimbursement upon return. **If requested in advance, contact Accounts Payable to take the check to the conference.**

Due to negotiated rates, accommodation at the conference hotel is always preferred. If the conference hotel is booked, check for overflow conference hotels or supply a 3 quote [D&F](#) to justify another hotel.

Individuals traveling on JCPS business should not be charged sales tax in Kentucky or Indiana. Most hotels in Kentucky will accept and may require a copy of our [tax exemption certificate](#).

In circumstances where it is unclear how certain expenses were paid, Finance may require a credit card statement or other proof of payment prior to reimbursing the expense.

NO LODGING OR PER DIEM ZONE

Expenses for lodging and per diem are not reimbursable if the conference/meeting is within a 50-mile radius from either the employee's home or JCPS. (See details on page 6). Required student supervision is an exception to this rule and should be noted on submissions for travel payment or reimbursement.

MEAL REIMBURSEMENT - PER DIEM

JCPS uses the per diem method to reimburse overnight, out-of-county meals. Receipts are not required to claim meal reimbursement. The list of localities qualifying as High Rate Areas can be found [here](#).

| | HIGH RATE AREAS | OTHER AREAS |
|-----------|-----------------|-------------|
| BREAKFAST | \$10 | \$8 |
| LUNCH | \$11 | \$10 |
| DINNER | \$23 | \$18 |

Travel times departing from Louisville and returning to Louisville should be identified on the travel voucher to indicate either full or partial meal days.

MEALS TO CLAIM BASED ON OUTBOUND/RETURN TIMES

| OUTBOUND Departure Times | Breakfast Eligible | Lunch Eligible | Dinner Eligible |
|-------------------------------------|-----------------------|-------------------|--------------------|
| Prior to 8 a.m. | No | Yes | Yes |
| 8 a.m. - 2 p.m. | No | Yes | Yes |
| After 2 p.m. | No | No | Yes |

| RETURN Arrival Times | Breakfast Eligible | Lunch Eligible | Dinner Eligible |
|---------------------------------|-----------------------|-------------------|--------------------|
| Before Noon | Yes | No | No |
| Noon - 6 p.m. | Yes | Yes | No |
| After 6 p.m. | Yes | Yes | Yes |

During a Professional Association Conference that serves a special meal, such as a banquet, the cost of this meal will be reimbursed in full (without regards to the rates above).

JCPS will reimburse travel for the employee one day before the start of the conference and/or one day after the final day of the conference due to travel restraints and conference dates/times, unless approved in advance by a Cabinet employee. Employees are expected to avail themselves of meals provided by the conference and/or hotel (ex/ free continental breakfast with room) as shown with a copy of the conference/workshop agenda, unless approved at the Cabinet level.

AIRPORT PARKING

When parking at an airport is part of business travel, JCPS will reimburse parking at the long-term surface parking lots. As of July 1, 2019, the Louisville International Airport daily rate was \$9.00. Short-term or garage parking fees will be reimbursed up to the \$9.00 daily parking rate.

GROUND TRANSPORTATION (TAXIS, BUSES, AIRPORT SHUTTLES, LYFT, UBER)

Fares to/from airports are reimbursable with receipts. A total of \$15 per day may be reimbursed, if a receipt is presented, for ground transportation to/from a restaurant if the given meal is not provided via the conference or the lodging facility, and the lodging facility restaurant is not open to obtain a meal at that time. To obtain this reimbursement, provide a detailed receipt and statement as to why ground transportation was necessary. Additional charges such as wait or late pickup are not reimbursable.

RENTAL CARS

JCPS will **not** pay for rental cars used while attending a conference, however exceptions may occur.

TRAVEL AGENCIES

Flights, lodging, and ground transportation may be booked directly or may be booked through a travel agent. Travel agents are recommended in situations involving student supervision and chaperoning.

CONTRACTOR TRAVEL

When a contract is negotiated and approved by the Board, and the contractor is to be reimbursed for travel expenses, the contractor is subject to these Travel Guidelines. The contractor will be required to submit itemized receipts for all expenses claimed. We will reimburse the amount of the itemized receipts up to the per diem rate.

NON-REIMBURSABLE EXPENSES

◆ **Caution: This list of non-reimbursable expenses is intended to be representative, not comprehensive.**

- 1) Alcohol
- 2) Baggage (lost baggage, optional baggage insurance, overweight baggage fees, more than one checked bag fee, oversized baggage fees, personal items, etc.)

- 3) Bank charges for ATM withdrawals and foreign currency conversion fees
- 4) Barbers and hairdressers
- 5) Cell phone charges, such as roaming
- 6) Change or cancellation fees of a flight/hotel reservation that do not fit into the following reasons:
 - a. JCPS business required change verified by supervisor
 - b. Canceled conference/meeting
 - c. Airline canceled flight
 - d. Death of a family member (spouse, child, parent, grandparent, grandchild, sibling)
 - e. Your own unexpected illness, which is **not** due to your own misconduct
- 7) Childcare
- 8) Clothing
- 9) Club and membership dues
- 10) Credit card charges/fees
- 11) Death of employee or family member while traveling
- 12) Dependent care
- 13) Entertainment, including event cost and associated transportation (theatre, concerts, sightseeing, tours, sporting events, social/amusement activities, golf fees, etc.)
- 14) Expenses due to personal negligence of traveler, including:
 - a. Fines/Fees—parking tickets, traffic violations, court costs, towing fees
 - b. Services to gain entry to a locked vehicle
 - c. Failure to cancel hotel reservations
 - d. Delivery of fuel to car
 - e. Jump-starting vehicle
 - f. Missed flights
 - g. Flight change due to failing to confirm details prior to departure
 - h. Airfare purchased less than 14 days in advance, unless the travel is for essential business travel as defined in these Travel Guidelines
- 15) Frequent flyer purchases/upgrades
- 16) Gifts
- 17) GPS
- 18) Gratuities/Tips, other than ground transportation tips up to 20% of the charge
- 19) Home or lawn maintenance expenses
- 20) Internet connectivity in hotel, airplanes, and other public places
- 21) Laundry/Dry cleaning services for travel of fewer than seven consecutive business days
- 22) Legal fees
- 23) Limousine service
- 24) Loss or theft of personal funds, property, or airline tickets
- 25) Meal expenses that do not involve an overnight stay
- 26) Meals for individuals who are not JCPS employees
- 27) Medical expenses (doctor fees, hospital charges, prescription medications, other medical services)
- 28) Mileage to attend either visitations or funeral services
- 29) Passport, vaccination, visa expenses, Global Entry Program, and TSA Pre-Check
- 30) Personal convenience/Comfort and upgrade expenses (early bird check-in fees, economy comfort seating, amenities, etc.)
- 31) Personal/Incidental expenses

- a. Movies, personal calls, manicures, pedicures, mini-bar, shoe shine, in-room video, fitness center fees, massages, spa treatments, reading material, snacks, sundry items, safety deposit boxes in hotel, etc.
- 32) Personal automobile insurance
- 33) Personal automobile maintenance/tune-ups, repairs
- 34) Pet care (veterinarian expenses, boarding/kenneling expenses)
- 35) Souvenirs
- 36) Spouse/Family/Guest/Companion expenses
- 37) Telephone
- 38) Transportation to entertainment events or venues
- 39) Travel insurance
- 40) Traveler’s check fees
- 41) Vacation or personal day expenses taken before, during, or after a business trip
- 42) Valet parking (unless required by the hotel)

OVERNIGHT TRAVEL PROHIBITED—50-MILE NO PER DIEM ZONE
(EXCEPTION: SUPERVISING STUDENTS)

| KENTUCKY COUNTIES PROHIBITED FOR ALL | | INDIANA COUNTIES PROHIBITED FOR ALL |
|--------------------------------------|------------|-------------------------------------|
| Anderson | Meade | Clark |
| Breckinridge | Mercer | Crawford |
| Bullitt | Nelson | Floyd |
| Carroll | Oldham | Harrison |
| Franklin | Owen | Jackson |
| Hardin | Shelby | Jefferson |
| Henry | Spencer | Jennings |
| Jefferson | Trimble | Orange |
| Larue | Washington | Perry |
| Marion | Woodford | Scott |
| | | Switzerland |
| | | Washington |

QUESTIONS?

GENERAL FUND – CALL OR [EMAIL](#) ACCOUNTING @ 485-3146

GRANTS – CALL OR [EMAIL](#) GRANTS & AWARDS @ 485-3461

(or contact the appropriate Grant Director, if applicable)

PURCHASING – CALL OR [EMAIL](#) 485-3543

BUDGET AMENDMENTS – CALL OR [EMAIL](#) 485-3438

NEW VENDOR FORM – CALL OR [EMAIL](#) ACCOUNTS PAYABLE @ 485-3377