TOWN OF HALIFAX

TRAVEL EXPENSE REIMBURSEMENT POLICY

1. PURPOSE AND SCOPE

The purpose of this policy is to establish guidelines for payment and reimbursement of expenses relating to approved in-state and out-of-state conferences and meetings. Regulations governing employee personal automobile use are contained elsewhere.

1. APPLICABILITY

All employees of the Town of Halifax, except for employees of the Halifax Elementary School, are subject to the provisions of this policy.

1. DEFINITIONS

There are no definitions specific to this policy.

1. POLICY

It is the policy of the Town of Halifax to reimburse employees for reasonable expenses which they incur as a result of attending in-state or out-of-state conferences or meetings on behalf of the Town. Employees will be reimbursed for reasonable expenses after submission of the appropriate documentation. Reimbursement for alcoholic beverages is prohibited by Massachusetts General Laws Chapter 44 Section 58.

The method(s) of submitting requests for reimbursement shall be consistent with accounting procedures and this policy. The Town Accountant will update the reimbursement request form as needed to satisfy the requirements of this policy and Massachusetts General Laws.

In connection with issues of reimbursement of food expenses, this policy should be read in conjunction with the Town’s Food and Beverage Policy.

1. PROCEDURES

5.1 Travel Procedures

Employees will be reimbursed for in-state travel only when such travel has been approved in advance by the department head or if said travel is taken by the department head, then the department head's appointing authority. Elected officials will need to provide the same written documentation as all other employees.

All out of state travel must be approved in advance by the department head, then the department head's appointing authority. Evidence of advance approval must be included with the Travel Expense Reimbursement Form.

5.2 Conferences and Seminars Registration

The Town will pay for approved conferences and seminars. Employees should submit conference registration forms/invoices on the appropriate department bill schedule. In extremely rare cases and with specific approval of the department head, the employee may pay for the approved conference or meeting directly and will be reimbursed after completing the Travel Expense Reimbursement Form. A receipt must be included with the Form. Employees will not be reimbursed for social events at conferences (such as golf tournaments or recreational tours). The Town Accountant will only approve the use of manual checks to pay for conferences and seminars in extraordinary circumstances.

5.3 Lodging

If an employee is required to lodge while traveling, reimbursement should cover only the employee’s cost of lodging and should not extend to any family members or other travel companions. Reimbursement may include incidentals such as the use of telephones, fax machines (if necessary).

5.4 Miscellaneous Expenses

The Town will reimburse employees for reasonable miscellaneous expenses such as travel to and from airports, parking, and travel within the conference destination (such as taxi cabs, shuttles, or buses) with receipts.

5.5 Use of Personal Credit Cards

Employees may use personal credit cards to pay for travel-related expenses if there is no appropriate mechanism for the Town to be billed directly for the expense. The Town cannot reimburse employees for any sales tax or similar taxes if a personal credit card is used. The Town will not pay for finance charges associated with credit card purchases of travel arrangements or other travel expenses.

5.6 Meals

5.6.1 Employees shall be reimbursed for meal expenses in accordance with the following schedule. Employees must submit receipts for meals purchased.

**Maximum**

**Meal Allowance Applicable Period**

*Breakfast $7.00 on work status before 7:00 a.m.*

*Lunch $11.00 on work status from 8:30 a.m. to 5:00 p.m.*

*Dinner $18.00 on work status after 5:00 p.m.*

5.6.2 For example, an employee who arrives at a workshop prior to 7:00 a.m. will be entitled to the breakfast allowance for that day. (The most common users of the breakfast allowance will be employees attending overnight conferences.) An employee who is at a conference for a full day (or days) will be entitled to a lunch allowance for that day if lunch is not included and paid as part of the conference registration. Finally, an employee who is at a conference which runs past 7:00 p.m. will be entitled to dinner allowance for that day. An employee eligible for both the breakfast and dinner allowance in a given day will automatically be entitled to the lunch allowance except as provided above. The maximum daily meal allowance is $36.00.

5.6.3 If a conference includes function meals, such as closing banquets, special luncheons, etc. the Town will reimburse the full cost of such meal. Program information detailing the cost of the special function meals should be submitted with the reimbursement request if the meal was not included in the registration fee. In the event that the Town reimburses or pays directly for a meal as part of a registration fee, the employee shall not also be entitled to a meal allowance for that meal.

5.6.4 Employees attending partial day workshops will not be eligible for meal reimbursements unless the meal is included in the conference registration unless the schedule of the employee requires the employee to be in a location other than Halifax during a specific meal time (for example, a meeting held in Boston at a time so that the employee is not able to return to the workplace or to the employee’s home for that specific meal).

5.7 Complying with Travel Policy

Employees who violate travel policies will be held directly responsible for their actions. Consequences of disregarding Town travel regulations may include revocation of travel privileges, reparation payments, suspension, or termination. Moreover, improper documentation of otherwise valid travel expenditures creates the appearance of fraud, waste, or abuse and may result in similar consequences. The following section presents suggestions for employees when complying with travel policies. While these suggestions will assist employees avoid the appearance of fraud, waste, or abuse in travel expenditures, they are not a replacement for individual employees being aware of the Town’s specific policies related to travel expenses.

In most cases, a reimbursement form or other travel voucher issued by the Town must be submitted and signed by the Department to receive reimbursement. Misrepresenting expenses and intentionally submitting false claims is fraudulent and could result in criminal penalties.

5.8 Reimbursement

* Employees traveling together should fill out reimbursement requests separately, being careful not to overlap claims.
* Employees must sign all claims.
* All expenses must be business related.
* Receipts should be attached to all travel expense reimbursement (including meals) requests. All receipts should be itemized and dated. In addition, names of the persons who are included in the bill should be listed on the back of the receipt to avoid multiple reimbursements for the same expense.
* Travel approvals MUST be attached to all reimbursement claims
* Business associates, vendors, or family members accompanying an employee traveling for business purposes are not eligible for travel reimbursement costs.

5.9 Other Circumstances

This policy is meant to cover the most common types of expenses related to employee travel. The Board of Selectmen may approve other reimbursements not explicitly covered by this policy if it is in the best interest of the Town to do so, and if reimbursement for such expenses is not expressly prohibited by local by-law or the Massachusetts General Laws.