I. Traveling is a necessary operation of state government. Travel expense can be a major budget consideration, so employees must be aware of the need for efficiency and economy in travel. The responsibility for adhering to the laws and policies and providing effective managerial control rests with the employee and their agency. Any collective bargaining agreement providing a greater meal or travel reimbursement supersedes this policy per the Montana Operations Manual Policy (MOMs).

A. Travel

All overnight in-state, out-of-state, and foreign travel requires advance approval from the employee’s immediate supervisor via the In-State Travel or Out-of-State Travel Justification Forms. For day travel in-state, the signed motorpool slip serves as your travel approval. Transportation costs and time away from the office should be kept to a minimum. When commercial travel is used, employees should use the least expensive seating available (Per MOM’s Employee Travel Policy).

B. Meals and Lodging Reimbursement

Employees will be reimbursed for meals and lodging while away from the employee’s designated headquarters and engaged in official state business in accordance with 2-18-501 et seq., MCA.

1. Reimbursement for meals shall be at the rates provided below providing the employee has been in a travel status for at least three hours during the designated time for that meal. For example, to receive reimbursement for the morning meal, employees must begin their travel before 7:00 a.m. To receive reimbursement for the evening meal employees must complete their travel after 6:00 p.m (Per MOM’s Meal Allowance Policy).

<table>
<thead>
<tr>
<th>Travel Period</th>
<th>In-State</th>
<th>Out-of-State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast (12:01 AM to 10:00 AM)</td>
<td>$7.50</td>
<td>$13.00</td>
</tr>
<tr>
<td>Lunch (10:01 AM to 3:00 PM)</td>
<td>$8.50</td>
<td>$15.00</td>
</tr>
<tr>
<td>Dinner (3:01 PM to 12:00 PM)</td>
<td>$14.50</td>
<td>$26.00</td>
</tr>
</tbody>
</table>

*These rates are effective 10/1/2021, effective dates are subject to change and will be incorporated into this policy*

a. For travel that includes students, chaperones, or other participants (students, parents and attending staff) meals will not be paid as a per diem to the individual participant, but will be paid on the pro card or reimbursed to staff member who paid the receipt. Meals must be within an approved cost rate, for preapproved travel and require specific documentation as outlined on the everyone drive/Federal Program Guidelines

2. Reimbursement for in-state lodging shall be as provided below.

b. Except as provided for in b. and c., the maximum lodging reimbursement rate for in-state travel is provided for in the State Employee Travel Policy.
c. Except as provided for in c., employees are eligible to be reimbursed for actual out-of-pocket lodging expenses, not to exceed the federal per diem room rate for the location involved, plus the taxes on the allowable cost, for any location in Montana if:
  i. Lodging occurs on or after June 1 but before October 1; or
  ii. The employee is attending a conference sponsored in whole or in part by a state agency and has obtained lodging at the conference facility.

d. The Commissioner of Higher Education or designee may approve reimbursement of lodging at actual cost, without applying the cap provided for in a. or b. above, under the following (Fill out Section #11 on ISJ or OSJ – Reimbursement for Actual Cost available at on intranet: https://mus.edu/che/intranet/index.html):
  i. Lodging costs below the caps provided for in a. or b. above, are temporarily unavailable due to special functions such as fairs, sporting events, or conventions or seasonal demands; or
  ii. Emergency travel arrangements preclude being able to find accommodations below the caps provided in a. or b. above; or
  iii. Remote locations with limited accommodations within a 15-mile radius preclude obtaining accommodations below the caps provided for in a. or b. above; or
  iv. The employee is employed in a regulatory or undercover function and has reasonable cause to believe there is risk to his/her personal safety.

e. The employee should provide adequate justification, along with the lodging receipt, to the Commissioner or designee. The justification should also indicate that reimbursement at actual cost is within the agency’s appropriation level (Per MOM’s Lodging Rates Policy).

3. Reimbursement for out-of-state lodging shall be as provided below.

a. The maximum lodging reimbursements for out-of-state travel is the maximum federal rate per day for the location involved, plus the taxes on the allowable cost. Reimbursement is at the standard federal rate unless the area or location is listed in the federal schedules with a specific maximum lodging rate that is higher than the standard. The federal per diem room rates for Montana are available through the Internet at the following location: http://www.gsa.gov/perdiem

b. Out-of-state lodging reimbursement includes the taxes on the allowable cost. If the employee’s actual out-of-state lodging rate is equal to or less than the maximum federal per diem rate for that area, the employee receives reimbursement for all taxes. However, if the employee’s actual lodging rate is higher than the maximum federal per diem rate for that area and reimbursement at actual cost is not approved, employees may receive reimbursement only for the taxes on the maximum allowable federal rate. NOTE: Many times, a lodging facility will waive taxes if it is established that the individual staying at the lodging facility is a government employee. In order to reduce travel costs, employees should inquire as to the taxability of their lodging rate.

c. Reimbursement of out-of-state lodging at actual cost may be approved if the request meets the following criteria (Request and Justification for Out-Of-State Travel form required prior to any related expenses being incurred):
  i. The employee requests government rates and they are not available at the hotel where the conference or meeting the employee is attending is being held and
  ii. Government rates or rates significantly lower than the conference hotel rates are not available at another hotel within a reasonable distance from the conference hotel (consider the cost of a taxi and the employee’s safety or convenience walking to other nearby lodging); or
  iii. It is necessary for purposes of accessibility and/or security to stay at the hotel in which the conference the employee is attending is being held; or
  iv. Emergency or last minute travel arrangements preclude finding accommodations within the federal guidelines; and
v. Reimbursement at actual cost is within the agency’s appropriation level.

d. Employees are required to obtain approval for reimbursement of lodging at actual cost before traveling out-of-state. Employees should provide adequate justification, along with the original lodging receipt, to the designated approving authority.

i. An electronic copy of a receipt may also be used for documentation/justification.

4. For nonreceiptable lodging facilities, employees shall be authorized reimbursement as provided for in the State Employee Travel Policy.

5. No reimbursement may be claimed for lodging provided at the expense of any government entity (Per MOM’s Lodging Rates Policy).

C. Mileage Reimbursement

1. State Motor Pool Car - A car may be obtained from the state motor pool in accordance with State Motor Pool procedures. When a state motor pool car is used, a copy of the Vehicle Requisition and Trip Ticket must be turned in to the Operations & Administration Department (Per MOM’s Employee Travel Policy).

2. Private Car Use - Employees who choose to use their own personal car in the performance of official duties shall receive the lower rate of reimbursement per mile which is authorized by the Department of Administration (DOA). In order to claim the higher rate of mileage reimbursement for personal car usage, a completed approval form must be obtained from the state motor pool stating that a motor pool car was not available. This approval must be attached to the employee’s travel voucher. The fiscal department shall notify all employees of any changes in the mileage reimbursement rate (Per MOM’s Employee Travel Policy).

a. ETS Personnel are required to use their personal vehicles for their daily work travel and professional development as they do not have access to motor pool. Per the ETS procedure manual, can request a rental vehicle for professional development travel in-state, but as most target areas do not have rental facilities nearby there is still required personal vehicle travel to the rental agency in the nearest larger town. ETS Personnel will follow the process and procedures outlined in their manual.

D. Travel Expense Voucher

A travel expense voucher must be completed by each employee in order to claim reimbursement for travel expenses. Instructions for completing the travel expense voucher are provided on the back of the travel expense voucher. (Note: If other expenses for $25.00 or more are claimed, a receipt must accompany the travel expense voucher.)

1. Employees are expected to complete and sign their own travel expense vouchers.

a. The immediate supervisor, designee, or the supervisor having the most direct knowledge of the travel-related activities must approve the employee’s travel expense voucher (Per MOM’s Employee Travel Policy).

2. Travel expense vouchers should be presented once a month for all travel in that month. If an employee does a great deal of traveling which creates a financial hardship, travel claims may be processed more often. Travel vouchers not received prior to 5:00 p.m. on the Thursday preceding the Friday pay period ending date will be paid in the next subsequent pay period.

3. All out-of-state travel requires advance approval from the employee’s immediate supervisor using the Request and Justification for Out-of-State Travel Form prior to incurring any related expenses. A completed, signed, and approved Request and Justification for Out-of-State Travel Form must accompany all travel reimbursement requests.

E. Travel Advances
Employees who need a travel advance must submit the travel advance request form available from the Operations & Administration Department to their supervisor.

1. The request should be submitted at least two weeks prior to the anticipated travel.

2. If an advance is allowed, it must be cleared within 30 days after completion of the travel. If the travel advance is not cleared within 30 days after completion of travel, the full amount will be withheld from the employee's future paycheck(s). If the expenses do not account for the entire advance, the difference will be withheld from the employee's salary or from other funds due them.

F. Increases in Reimbursement Rates

The reimbursement rates provided herein may be changed from time to time by action of the legislature. If a conflict exists between this policy and the statute authorizing the rates, the statute shall prevail.

G. Travel Expenses

Reimbursable travel expenses are the business-related expenses incurred when traveling on official state business. Nonbusiness-related expenses incurred when taking vacation or compensatory time off while in a travel status are not reimbursable. Typically, reimbursable business travel expenses include transportation costs (airfare and/or ground-transporting vehicles), meals, and lodging.

Miscellaneous business expenses associated with official state travel may also be reimbursable, including necessary supplies; airline baggage for one bag, unless special circumstances are preapproved, and seat fees not due to upgrades; airline insurance that solely protects against trip cancellation or re-booking fees; taxi fares including a reasonable tip, (not to exceed 20% of total cost); and parking fees excluding parking tickets issued for non-compliance with city/county/airport authority rules, unless the agency director, or designated approving authority, authorizes reimbursement of parking tickets issued as a result of extenuating circumstances that the employee could not avoid.

When renting a vehicle, employees must not purchase additional liability, comprehensive, or collision insurance offered by the rental agency. Insurance is provided for the employee either through the DOA-Risk Management and Tort Defense, or by the state procurement card company when the rental vehicle is paid for with the state-issued purchasing card.

Each reimbursable expense of $25 or more must be supported by a receipt; however, an agency director may require receipts for all expenses, including those less than $25, be provided as proof for reimbursable travel expenses. Meal tips and meal taxes are not considered miscellaneous expenses.

All travel reimbursements, excluding the Montana University System (MUS), are to be issued through the state payroll system. Employees are encouraged to use a state issued purchasing card for their traveling expenses, exclusive of meals. Employee meals are typically reimbursed at a fixed per diem rate, not at actual cost, and should not be purchased with a state-issued purchasing card (Per MOM’s Employee Travel Policy).

II. Mode of Transportation

An employee shall utilize the most efficient and economical mode of transportation for official state business. Whenever possible, consideration should be given the possibility of coordinating multiple state employees’ business travel arrangements, so costs may be pooled and provide the state with cost savings. For example, car-pooling with multiple employees in a single vehicle may provide statewide cost-savings above what it will cost for each individual to purchase an airline ticket, even if the time needed to
drive is greater than the flight time. Agencies are encouraged to work together in efforts to keep statewide costs down (Per MOM’s Employee Travel Policy).

A. Employees using commercial airline travel should choose seat assignments in the lowest cost sections available on the aircraft. Baggage should be maintained at the minimum necessary for the purpose of the employee's travel. Miscellaneous aircraft charges, such as in-flight internet access, must be related to official state travel to be eligible for reimbursement.

1. Ticket Purchase Agencies and employees are required to use a state purchasing card to purchase all airline tickets for employee travel unless it can be documented that another payment method is in the state's best interest. This applies to ticket purchases made through a travel agent, purchased directly from an airline, or purchased from an online travel source. Agencies and employees are strictly forbidden to use a state purchasing card to purchase an airline ticket for an individual who is not traveling on official state business. If an employee traveling on official state business is being accompanied by a traveler not on official state business, and it is necessary that they travel at the same time and on the same flight, it may be necessary that both tickets are purchased at the same time. With approval from the agency director, or other approving authority, this scenario could constitute a situation when it is in the state's best interest to use a payment method other than a state purchasing card.

B. Employees should contact the State Motor Pool, operated by the Department of Transportation, which a variety of vehicles available in Helena. The employee must use motor pool vehicles for business travel whenever possible. Direct questions regarding procedures to the motor pool office at 444-2705.

State Vehicle Use Rules govern the use of state-owned or leased vehicles from the motor pool. The motor pool bills the agencies periodically for the vehicles used. Agencies that have their own state vehicles should establish rules regarding the use of their vehicles.

If motor pool vehicles are not available, the employee has the option to use their personal vehicle or vehicles from a private rental agency contract. Employees who wish to use their personal vehicle for official business travel should be familiar with the requirements in the Mileage Reimbursement Rates policy available on the Employee Travel webpage and must obtain approval prior to travel via the Personal Vehicle Use Authorization form located on the OCHE intranet (Per MOM’s Employee Travel Policy).

References:
MOM’s Employee Travel Policy
MOM’s Lodging Rates Policy
MOM’s Meal Allowances Policy
MOM’s Mileage Reimbursement Rates Policy
2-18-501, et seq. MCA
Board of Regents Policy 807.1