



City of Appleton

Travel*Wise* Guidelines

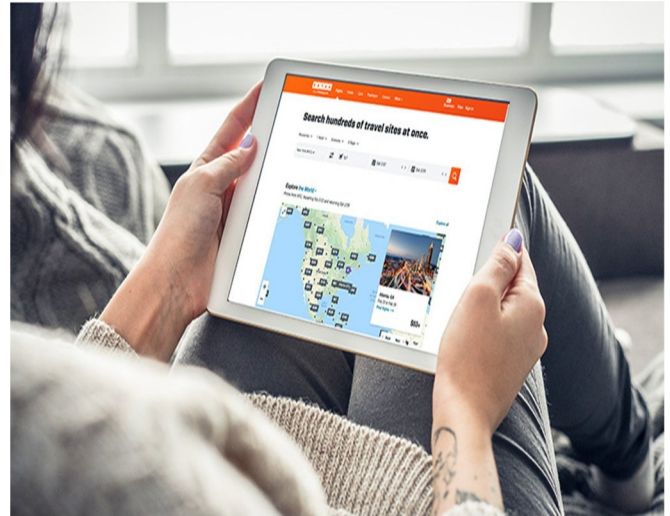
Investing in You to Help You Grow



The City of Appleton believes in investing in our employees to help them grow. We want you to develop in your role and prosper in your career while working for the City of Appleton. As you pursue growth opportunities and travel for your position, you may incur travel expenses during authorized City travel. This guide will help you “TravelWise” and is meant to assist you as you navigate the authorization and reimbursement of those travel expenses.

BEFORE YOU GO

All travel should be pre-approved before incurring expenses. **Please note that this approval process is at the discretion of the department and** may be subject to availability of funding and staffing coverage needs. Please ensure that you receive the authorization from your supervisor prior to incurring any expenses related to the travel. **An optional pre-approval form (Appendix A) is attached and may be used to coordinate pre-travel approval within your department if desired.**



AS YOU TRAVEL

As you plan and travel, please keep this in mind: the City is investing in you to help you grow. Out of respect for this investment and to allow opportunities for others (through the available budget), you are asked to travel at the lowest reasonable cost unless extenuating circumstances exist. Please consider:



Airline/Rail Travel: when searching for flights and rail trips, please be a smart consumer and consider options from both local and regional airports and rail stations, and book in advance to allow for the best travel rates. Baggage will be reimbursed for one suitcase and one carry-on. The cost of cancelling and/or rebooking of travel plans is not reimbursable unless for business reasons (e.g., changed meeting date) or extraordinary circumstances.



Rental Vehicles: rental vehicles are not typically eligible for reimbursement except for extenuating circumstances. If these circumstances necessitate the need for a rental car while traveling, after receiving prior supervisory approval, employees should rent the vehicle from www.budget.com and use the City’s Budget Corporate Discount (BCD) number W265263. Please use your City procurement card to rent the vehicle and purchase the auto liability insurance from the rental company.



Lodging: is reimbursable at a single, standard room rate.



Meals: employees will receive the US General Services Administration (GSA) Standard Continental United States (CONUS) meal and incidental rate for meals purchased during your travel. Any meals provided by the hotel or during your training/travel are not reimbursable. Meal reimbursement is only for meals that are purchased (e.g., please do not claim per diem for skipped meals). This diem is not subject to payroll taxes according to IRS regulations.



Parking/Transportation: parking fees, tolls, taxis, shuttles and rideshares during approved travel are reimbursable. Receipts are only needed if the charge is more than \$50.



Tips: tips for meals are included in the meal reimbursement rate (above). Other tips (e.g., for taxi cab rides, etc.) should be reasonable (e.g., 15%) and noted on the reimbursement form (Appendix B) when you return from your trip.



Spouse/Guest Travel: only employee expenses are reimbursable. Any additional costs incurred due to a spouse/guest traveling with the employee are not reimbursable.



Fines: fines (e.g., traffic/parking) resulting from traveling on City business are not reimbursable.



Time: non-exempt employees who travel out-of-state for training are paid for their travel time based on air/rail travel time (unless stated differently in the employee's bargaining contract). If the employee chooses another means of transportation, any resulting additional time required for travel shall be charged to the employee's paid leave.



Mileage Reimbursement: mileage reimbursement is available for employees who do not have regular access to a City vehicle and who travel beyond a 15-mile radius from the employee's usual work facility or residence (whichever is closer) for City business (the total round trip of 30 miles or more). Mileage reimbursement for the use of the employee's vehicle is based on the standard IRS mileage rate in effect. The mileage reimbursement should be calculated as the difference between the training/travel event location and the employee's usual City work facility or residence (if driving to training/travel event directly from home), whichever is less. Commuting expenses between an employee's residence and their normal place of business are not eligible.

For positions that are expected to use their personal vehicle to travel for work on a regular basis, Department Directors may designate these positions to receive a \$30 monthly local mileage allowance (prorated for positions that work less than full-time). Directors and Deputy Directors are not eligible for this allowance without pre-approval from the Mayor. This per diem is subject to payroll taxes according to IRS regulations. For all other positions, mileage incurred within the City limits or between City facilities is not reimbursable.

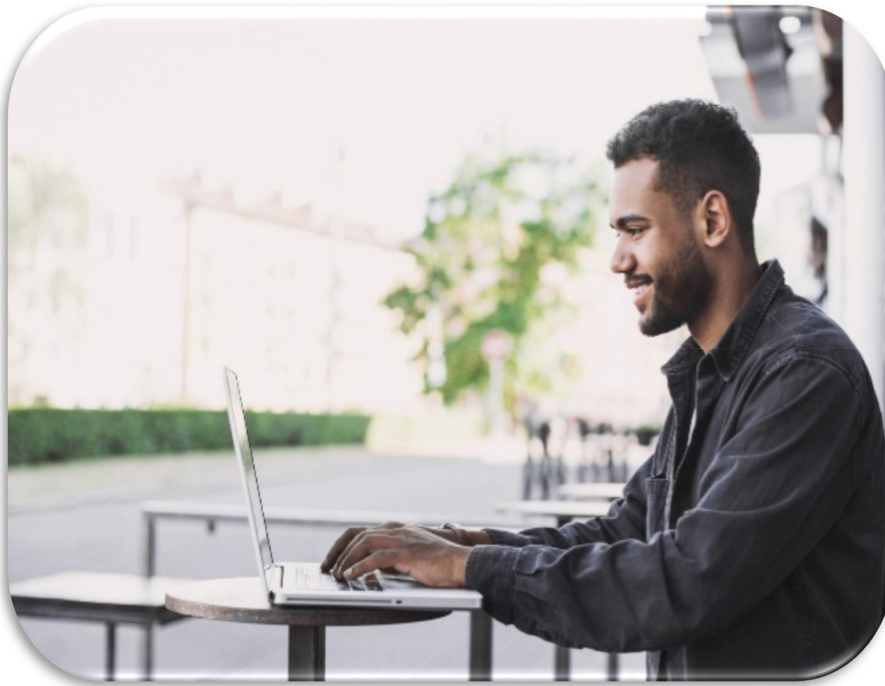
AFTER YOU RETURN

Once you return from your trip/travel, you will want to complete the Post-Travel Form (Appendix B) to be reimbursed for approved expenses.

Because of the City's investment in your training/travel, it is suggested that you also complete Appendix C to share with your Department Director. If there are others who would benefit from the new knowledge you acquired during your training/travel, you are highly encouraged to share what you learned with your supervisor and other colleagues as well (e.g., share insights you learned during an upcoming staff meeting).

STILL HAVE QUESTIONS?

If you have questions prior to, during, or after your travel, contact your supervisor. For reimbursement questions when you return, contact the Finance Department who will process the reimbursement payments.



Appendix A: Pre-Approval Form **OPTIONAL**

Before incurring any expenses for your travel/trip, you will want to **obtain** ~~complete~~ the pre-approval form to ensure your expenses will be covered when you return. **Below is a form you can use; however, your department may have a specific process for requests or individual departmental form. Ask your supervisor for more details.**

PLEASE COMPLETE BEFORE REGISTRATION OR INCURRING COSTS

Employee Requesting Travel: _____ / _____

Title of Training or Purpose of Travel (attach brochure/agenda): _____

City/State of Training/Event: _____

Dates (time) request to be out of the office: ____ / ____ (_____ AM/PM) through ____ / ____ (AM/PM)

Are there other City employees attending this training/event as well? If so, why?

Estimated Costs

Details (e.g. vendor name, specific expenses)

Registration Fee:	\$	_____	_____
	\$	_____	_____
Lodging:	\$	_____	_____
Airfare/Rail:	\$	_____	_____
Meals (based on per diem rate):	\$	_____	_____
Other (e.g. rental car, mileage):	\$	_____	_____
Overtime for your attendance:	\$	_____	_____
Overtime to cover your vacancy:	\$	_____	_____
TOTAL:	\$	_____	_____

How does this training/travel help meet your individual, departmental or organizational goals?

Date Submitted to Supervisor: _____

SUPERVISOR'S RESPONSE:

Authorized Date of Departure and Return: _____

I authorize this employee to register for this training and incur these travel-related expenses (as detailed above).

Supervisor Signature

Date

Department Director Signature

Date

Appendix B: Post Travel Form **REQUIRED**

ACTUAL EXPENSES: EMPLOYEE MUST COMPLETE UPON RETURN (SUBMIT TO FINANCE) AND PROVIDE DOCUMENTATION FOR ALL EXPENSES EXCEPT AS NOTED

Travel City/State and Dates: _____

Date	M	T	W	R	F	S	S	
1. Lodging:	\$	\$	\$	\$	\$	\$	\$	\$ _____
2. Breakfast:	\$	\$	\$	\$	\$	\$	\$	(no receipts required) \$ _____
3. Lunch:	\$	\$	\$	\$	\$	\$	\$	(no receipts required) \$ _____
4. Dinner:	\$	\$	\$	\$	\$	\$	\$	(no receipts required) \$ _____
5. Parking/Tolls/Taxi (receipts only required for single transactions of more than \$50):	_____							\$ _____
6. Airfare:	_____							\$ _____
7. Registration:	_____							\$ _____
8. Other:	_____							\$ _____
9. Mileage _____ miles @ \$ ____/mile (no receipts required)								\$ _____
*Mileage within 15 miles of the employee's usual work facility is not eligible for reimbursement								
10. TOTAL EXPENSES (Trip Total):								\$ _____
11. Less Section-2 Advance Registration Payments								\$ (_____)
12. Less Procurement Card Charges: _____								\$ (_____)
13. Less Vendor Refunds								\$ (_____)
14. AMOUNT DUE TO (FROM) EMPLOYEE								\$ _____

BUDGET ACCOUNT #: _____

This is to certify that the above is a true and correct statement of travel expenses incurred in the conduct of City business. I have attached all supporting documentation (e.g., training brochure, airline receipt, etc.) and I acknowledge I may be personally responsible for any expenses I incurred for which I do not have supporting documentation (except for meals, mileage and transportation expenses of less than \$50 in a single transaction).

Employee Signature _____ Supervisor Signature _____

Department Director Signature _____ Finance Signature _____

Appendix C: Evaluation **OPTIONAL**

Employee Name:

Training Program/Conference:

1. What are the three greatest learnings that you took away from this training/travel?

2. Describe two ways that you plan to apply what you learned during your training/travel to benefit your department and/or the City.

3. What did you learn that you plan to share with others? (Please list with whom/when.)

Training Program Only

This training course:

- Exceeded my expectations Met my expectations Did not meet my expectations

The instructor of the course:

- Exceeded my expectations Met my expectations Did not meet my expectations

Would you recommend this training class to others?

- Yes
 No

Please explain:

Please return this form to your Department Director within 30 days of returning from your training/travel.