



Financial Management Circular: #2016-02

Effective Date: October 3, 2016

General Subject: Travel, Moving and Interviewing Policies for the State of Indiana;

Repeals: FMC #2014-1

Specific Subject: Same as General Subject

Authority: IC 4-12-1-13(e)  
IC 4-12-1-13(h)  
IC 4-13-1-4(7)

Application: This Circular applies to all State employees, board and commission members, potential employees, and persons under contract with the State.



<b>Title: Travel Policy and Procedures</b>	<b>Financial Management Circular #2016-02</b>
<b>Policy Owners: Department of Administration Office of Management and Budget</b>	<b>Issue Date: 09/19/2016 Effective Date: 10/03/2016 Revision No: 00002</b>

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**REVISION HISTORY**

The latest version shall supersede all prior formal or informal policies and procedures.

Revision Date	Effective Date	Revision Number	Summary of Changes
08/31/2016	10/03/2016	1	<ol style="list-style-type: none"> <li>1. Sect. 3. Authority – Updated to be consistent with Indiana Code.</li> <li>2. Sect. 5 Definitions – Included new definitions to clarify Policy requirements and other selected definitions.</li> <li>3. Sect. 6 Responsibilities – Included further definition of involved parties.</li> <li>4. Sect. 9 Agency Management – Clarified agency structure for Policy management within agency.</li> <li>5. Sect. 12 Standard Out-of-State Travel Request Submission Process – Requested submission be provided electronically through email OR PeopleSoft Travel &amp; Expense instead of hard copy. Included an identification reference of the supportive documentation requirements.</li> <li>6. Sect. 13 Rush Requests – Designed process to help identify the difference between true rush needs.</li> <li>7. Sect. 14 Emergency Travel – Added section to further identify the process when required.</li> <li>8. Sect. 21 Mileage – Incorporated the new reimbursement rate calculation according to the agreed upon June 26, 2015 Memorandum.</li> <li>9. Sect. 22 Lodging – Incorporated a section previously omitted in July 2014 Policy known as Section 7-7: 50 Mile Restriction/Exception.</li> <li>10. Sect. 22 Lodging – Clarified sales tax requirements related to In-State hotel/lodging facilities.</li> <li>11. Sect. 24 State Travel Card, Reimbursement, and Payments – Connected State Travel Policy and State Travel Card requirements by reference. SBOA updated the Claim Amounts subsection and suggested removal of the Expenditure Classifications.</li> <li>12. Sect. 27 Event Planning – Provided direction when hotel/lodging facilities are included in event planning.</li> </ol>

**1. BACKGROUND**

Business travel and related expenses represent a substantial cost to the State of Indiana. To optimize travel expenditures, standards must be established that are applicable to all State employees. The provisions under the policy are intended to support the most prudent business choice and may not always allow for the employee's personal preference.

**2. PURPOSE**

To establish the correct behavior associated with travel expenditures through documented processes for Travel, Moving and Interviewing that are consistent with good business practices. This will allow employees to maximize their effectiveness while conducting business at the lowest cost for the State.

**3. AUTHORITY**

IC 4-12-1-13(e), IC 4-13-1-4 (7)

**4. PERSONS, GROUPS, SYSTEMS AFFECTED**

This policy applies to all State employees, board and commission members, potential employees, persons under contract with the State, and any agency paying for the travel. Judicial and the legislative branches are not required to follow this policy, although it is encouraged. A State Traveler shall only be authorized to engage in State Travel in accordance with this Policy.

**5. DEFINITIONS**

#	Reference	Definition
1	Agency	Refers to an administrative agency or department, authority, board, branch, commission, committee, department, division, or other instrumentality of the executive branch of State government, and any entity required by State Statute to be included as a State Agency. It does not include the judicial branch, or the legislative branch. "Agency" also refers to the agency paying for the travel.
2	Agency Head	Refers to the chief executive officer of an Agency.
3	Commissioner	Refers to the Commissioner of the Indiana Department of Administration.
4	Department	Refers to the Indiana Department of Administration established by IC 4-13-1-2.
5	Department's Travel Division	Refers to the Indiana Department of Administration's Travel Division.
6	In-State Travel	Refers to State Travel within the State of Indiana or within the State of the traveler's station.
7	Out-of-State Travel	Refers to State Travel that starts or ends in the State of Indiana, or within the State of the traveler's station, and includes crossing the State Line into any other State.
8	Reimbursement for State Travel	Refers to the State's payment of a subsistence allowance, mileage allowance, or a reimbursable expense to a State Traveler.
9	State	Refers to the State of Indiana.
10	State Budget Director	Refers to the Director of the Indiana State Budget Agency.
11	State Business	Refers to permitted lawful activity by a State Traveler on behalf of the State or an Agency, which advances or is reasonably calculated to advance the goals and purposes of the State or Agency on whose behalf the activity is undertaken.
12	State Travel	Refers to travel by a State Traveler who is engaged in the performance of State business on a trip away from the individual's home or station.
13	State Traveler	Refers to a State employee, commission or board member, a person under contract with the State, and all others previously approved by the Indiana State Budget Agency, who is in Travel Status.
14	State Travel Expense	Refers to the additional reasonable costs incurred by a State Traveler resulting from traveling for the State on State Business, excluding all items personal in nature or items not resulting from State Travel.
15	Station	Refers to: (A) For a State employee, the location of the employee's assigned permanent office and (B) For all other persons, in the following order: (1) the place stipulated in a contract with the State; (2) the person's office; or (3) the person's home.
16	Travel Allowances	Refers to the rates of reimbursement established for State Travelers by the State Budget Director and the Commissioner and which are based on the Acts of the General Assembly.
17	Travel Office	Refers to the Travel Division of the Department and any contractor assisting with travel services for the State.
18	Travel Status	Refers to the status of a State Traveler who has started to travel on State Business, whether or not travel expenses will be reimbursed by the State.
19	Travel Request	Refers to the documentation packet submitted to the Department.
20	Mapping Source	Refers to online mapping source such as, Rand McNally, MapQuest, etc.
21	State Travel Contract Vendor	Refers to the State Travel Quantity Purchase Agreement Vendor in contracted agreement with the Indiana Department of Administration on behalf of the State.
22	State Travel Vendor website	Refers to the State Travel Quantity Purchase Agreement Vendor website provided for flight reservations, hotel options, etc.
23	State Travel Vendor Booking Tool	Refers to the reservation/booking tool provided by the State Travel Vendor.
24	State Travel website	Department website <a href="http://www.in.gov/idoa">www.in.gov/idoa</a> under Travel Services.
25	RUSH	Refers to a Travel Request requiring attention prior to the thirty (30) day travel submission requirement when there is a unique situation that is in the State's best interest to pursue that couldn't have been provided to the Department thirty (30) days prior to the Departure Date.
26	Emergency Travel	Refers to travel involving State Business of safety and security requiring the response of the State Traveler to be immediate in nature.
27	Mileage Calculator	Also known as 'Rent or Reimbursement tool', refers to the calculator provided on the State Travel website shall be used to compare and find the most cost effective mode of vehicle travel.
28	Agency Travel Coordinator	Refers to the key contact in the Agency that handles Travel approvals and processes on behalf of the Agency.



**6. RESPONSIBILITIES**

#	Responsibility	Description
1	Department of Administration	Administer and enforce this Policy in accordance with IC 4-13-1-4; Possess the authority and power including without limitation, the authority and power to design, promulgate, and require the use of such documentation, including State Travel forms, as the Department deems essential or convenient to the administration and enforcement of this Policy; Provide the travel services and related services and products to the agencies required to use them under this policy.
2	Authority of the Department	Delegation Allowed and Limitation: If this Policy requires an Agency to take some action, the action may be taken by the designee or the Agency Head. If this Policy requires an Agency Head to take some action, the action may not be delegated by the Agency Head.
3	Agency	An Agency may develop internal policies and procedures relating to State Travel in their Agency. Agency policies and procedures may not be inconsistent with this Circular and must be approved by both the State Budget Director and the Commissioner, or their respective designees.
4	State Traveler	All State Traveler's seeking reimbursement should incur the lowest reasonable travel expense. Exercise care to avoid impropriety or the appearance of impropriety, including the public perception that a business trip has been taken for personal reasons. Public funds may never be used for personal gain. If a circumstance arises that is not specifically addressed, either the most conservative course within the spirit of this policy shall be adopted or consultation for guidance with the Department shall be pursued. If an employee believes they require accommodation under the American Disability Act (ADA) written documentation from their agency's State Personnel Department representative will be required to support the request.
5	Budget and Compliance Responsibility	Notwithstanding the timely receipt of applicable approvals, the Agency has the responsibility to assure that actual travel expenses do not exceed budgeted travel expenses. It is also the responsibility of the Agency to ensure that travel expenses incurred on behalf of the Agency are in compliance with this Policy.
6	Authorized State Travel	The Agency shall be responsible for the prior authorization of travel for both In-State and Out-of- State Travel. It shall be the duty of the Agency to review the authority for travel prior to filing travel claims with the Auditor of State.
7	All Travel Related Parties	All parties referenced in <b>Section 4</b> titled: <b>Persons, Groups, Systems Affected</b> are to comply with this Policy.

**7. POLICY STATEMENT**

- A. The State provides reimbursement for business expenses which are: (1) necessary and incurred in process of conducting State business; (2) reasonable in nature; (3) properly documented and authorized; and (4) in accordance with this Policy.
- B. State employees are responsible for understanding and adhering to this Policy.
- C. Business travel arrangements to be reimbursed by the State must be arranged through the State's Travel Agency using preferred suppliers, except where alternatives are allowed within the Policy.

**8. POLICY EXCEPTIONS**

The State Budget Director and the Commissioner, or their respective designees, may authorize exceptions in writing, jointly, to this Policy. An Agency Head requesting an exception shall state the request in writing and submit it to the Department. Reasons for exceptions include, but are not limited to the following: emergency, loss or harm to the State or others.

**9. AGENCY MANAGEMENT**

Each agency must assign a Travel Coordinator. The Travel Coordinator is the key contact in the Agency that handles Travel approvals and processes on behalf of the Agency and is the key travel contact for all communications with the Department.

**10. IN-STATE TRAVEL OVERVIEW**

Agencies are to develop and maintain internal policies and procedures relating to In-State Travel for State Travelers. Such policies and procedures must be consistent with this Policy and must be approved by both the State Budget Director and the Commissioner, or their respective designees. Agencies are required to maintain all supportive records as indicated by the Auditor of State and State Board of Accounts. A State Traveler is required to fulfill all requirements noted within the Agency's Travel Policy before traveling on behalf of the state.



**11. OUT-OF-STATE TRAVEL OVERVIEW**

Unless otherwise approved by the Department, each Out-of-State Travel request must have all Agency approvals and then be approved by the Department **before traveling** on behalf of the State. The Travel Request must be approved in advance and in writing by the Commissioner, and the Agency Head, or their designees, as well as, by the Department. At the discretion of the Department or upon request from an Agency, additional approvals may be requested. Each Travel Coordinator is required to submit each Out-of-State Travel request to the Department as identified in this Policy as **Section 12** titled: **Out-of-State Travel Submission Request Process**. Failure to receive proper approvals can result in denial of reimbursement for the expenses.

**12. STANDARD OUT-OF-STATE TRAVEL REQUEST SUBMISSION PROCESS**

General Out-of-State Travel Submission Criteria:

- A. All applicable criteria below must be complete at the time of submission to be considered for review and approval. Failure to submit all completed documentation requirements thirty (30) days before the Departure Date may result in the State Traveler not being approved by the Departure Date. If the Travel Coordinator is waiting specifically on the event's finalized agenda to finalize the Travel Request packet, the Department will accept substitute documentation for that particular item to illustrate an agenda will not be available until less than thirty (30) days before Departure.
- B. State Travel is designed to reimburse a person's expenses when on State Business as compliant within this Policy and allowing up to one (1) day of travel time the day before and up to one (1) day of travel time the day after the meeting, depending on actual circumstances, as approved by the Department.
- C. Travel status should not start prior to, or end after, the normally required periods of time necessary to complete the official State Business.
- D. The primary purpose for travel must be State Business, but occasionally a person may be approved to take a trip that includes both personal time and business travel. The **State Form 823** ("SF 823") "*Authorization For Out of State Travel*" must indicate the complete period of time the person will be Out-of-State, including personal time. No Out-of-State Travel will be approved if it encompasses personal leave both before and after, or in the middle of the official State Business. A State Traveler shall exercise special care not to seek reimbursement for expenses that could be construed to be personal. If vacation leave or time off is combined with any trip, the lodging and subsistence for the extra days of travel time are not eligible for reimbursement.
- E. Persons traveling to locations within four (4) hours drive time are generally expected to travel by automobile (example: from Indianapolis to Chicago). However, individual circumstances and time commitments before and/or after travel may necessitate airline use. Airline use in these circumstances must be approved by the Agency and the Department.
- F. Normally "side-trips" are not approved in conjunction with State Travel. However, special calculations are required when the travel includes "side-trips" not required for State Business. If State Business requires the State Traveler to travel from city "A" to city "B" and the State Traveler actually travels to city "C" either before or after going to city "B", the allowable reimbursement would be the prorated roundtrip commercial carrier fare actually paid between city "A" and city "B", or the map mileage times two (2) if driving a personal vehicle.
- G. When two (2) or more employees are traveling the same general route, the Department requires that only one (1) vehicle be driven if it is administratively feasible or otherwise appropriate. The Mileage Calculator provided on the State Travel website shall be used to compare and find the most cost effective mode of vehicle travel.
- H. Prior to submitting the request for Out-of-State Travel, the Agency Travel Coordinator shall be contacted regarding reservations for lodging accommodations (i.e. hotel rates from website(s), hotel documents), airfare, or other travel arrangements. Estimates must be obtained by accessing the State Travel Vendor Booking Tool or contacting the State Travel Contract Vendor.

Out-of-State Travel Submission Process:

Regardless of Submission type, Agency Travel Coordinators must ensure that the following documents are included when applicable before submitting request:

<b>If trip requires:</b>	<b>Required documentation:</b>
Air Transportation	Flight details from State Travel Vendor website.
Hotel	Pricing documentation or hotel confirmation.
Vehicle Rental	Rental Pricing Documentation/Confirmation.
Personal Vehicle	Driving Directions with shortest distance mileage from online Mapping Source.
Conference or Training	Include Conference/Training agenda. If registration fees are applicable, include conference documentation identifying fee(s).
No-Cost Trip	Documentation stating how expenses will be covered.

A. Submission Option #1 - EMAIL:

Thirty days (30) days before the State Traveler's Departure Date, the Agency Travel Coordinator is required to submit a completed **State Form 823** "*Authorization For Out of State Travel*" signed by all required Agency approvers to [IDOATravel@idoa.in.gov](mailto:IDOATravel@idoa.in.gov) in one master PDF that contains all applicable documentation, and reference the email subject line by including the Agency acronym, State Traveler's first/last name, and the Departure Date (subject line example: IDOC – John Doe – 02/28/2015). If multiple State Employees are being requested to attend the same event, the Travel Coordinator shall make best efforts to submit all Travel Requests at the same time.



B. Submission Option #2 – PeopleSoft Travel & Expense (“T&E”):

Thirty days (30) days before the State Traveler’s Departure Date, the State Traveler, Agency Travel Coordinator, or designee is required to complete all applicable data fields within the T&E module, and include all applicable documentation, to then be routed through PeopleSoft Workflow.

### 13. RUSH REQUESTS

- A A Rush Request refers to a Travel Request requiring attention prior to the thirty (30) day travel submission requirement when there is a unique situation that is in the State’s best interest to pursue that couldn’t have been provided to the Department thirty (30) days prior to the Departure Date. Examples of unique situations:
- Example #1: If a Travel Request was approved for State Traveler A, and State Traveler A can no longer attend, and State Traveler B can attend, and it would be in the best interest of the State to not lose any paid expense, then State Traveler B would need to work with their Travel Coordinator for a Rush Request to replace State Traveler A’s paperwork with State Traveler B.
  - Example #2: If the Agency needed to pick up special machinery in another state as an unforeseen circumstance, and this was in the best interest of the State.
- B See Section 14 titled: Emergency Travel to identify the difference between RUSH vs. Emergency Travel.
- C If Out-of-State Travel is generally submitted via EMAIL, instead of T&E, and requires attention less than thirty (30) days before the Departure Date, then the Agency Travel Coordinator shall mark the Travel Request as a RUSH on the SF 823 and include justification from the Agency Head detailing the RUSH reason on the SF 823. Additionally, the Travel Coordinator shall send a RUSH Request Email notification marked high importance to [IDOATravel@idoa.in.gov](mailto:IDOATravel@idoa.in.gov) with a subject line format of: “RUSH – Agency Acronym – State Traveler – Departure Date”, and include in the email body the Rush Request justification.
- D If submitting a RUSH Request via the PeopleSoft T&E Module, the Travel Coordinator shall send a RUSH Request Email notification marked high importance to [IDOATravel@idoa.in.gov](mailto:IDOATravel@idoa.in.gov) with a subject line format of: “RUSH – Agency Acronym – State Traveler – Travel Authorization number – Departure Date”, and include in the email body the Rush Request justification.
- E Airfare should be purchased within a minimum of twenty-one (21) days in advance of the Departure Date to take advantage of industry rates.

### 14. EMERGENCY TRAVEL

- A. Emergency Travel refers to travel involving State Business of safety and security requiring the response of the State Traveler to be immediate in nature.
- B. In circumstances requiring Emergency Travel, the Travel Coordinator will send EMAIL notification marked with high importance to [IDOATravel@idoa.in.gov](mailto:IDOATravel@idoa.in.gov) with a subject line format of: “EMERGENCY- Agency Acronym-State Traveler-Departure Date”. The email should outline the circumstances of the request, destination of travel, and dates of travel.
- C. Upon receipt, the Department will issue the required approval for travel.
- D. Once the emergency has passed, the Travel Coordinator will submit the SF 823 and required documentation as outlined in Submission Option #1 – EMAIL.

### 15. STATE CONTRACTS AND NON-STATE EMPLOYEES

- A. Agencies entering into contracts which provide for specific reimbursement of travel expenses must specify in the contract that travel reimbursement to persons under contract shall be consistent with this Policy and paid via their contract purchase order.
- B. Travel arrangements for all contractors and speakers are required to be made through the Agency Travel Coordinator. The options for booking will be to: 1) Use the State travel contract vendor online booking tool and 2) Work with the Department to determine when the State travel Contract vendor should be contacted directly, e.g., the State travel contract vendor may be contacted directly for assistance with lodging when lodging cannot otherwise be located.
- C. At the discretion of the Department or upon request from an Agency, additional approvals may be requested.
- D. Any State Employee traveling on behalf of a State Contract must follow all State Travel applicable details noted in this Policy.



**16 TRAVEL RATE CHART SUMMARY**

The following chart includes the general rates related to State Travel:

Item	Detail	
<b>Air Travel</b>	Agencies to use online booking tool from the State Travel Contract Vendor Website for rates.	
<b>Vehicle Travel</b>	Agency to use State Contract for Vehicle Rental. Rental rates shown on State Contract. Agencies are recommended to use and pay for the Economy class, unless approved by the Department.	
<b>Parking and Tolls</b>	A person in travel status may be reimbursed for the cost of parking and tolls when using either a personal vehicle or a State vehicle. Valet parking will be reimbursable when "self-parking" is not available, or is cost effective and practical. (e.g., cost less, one fee with in/out privileges). Receipts satisfying the requirements of this Policy must be included with the claim for reimbursement.	
<b>Mileage</b>	<ol style="list-style-type: none"> <li>1. Traveler/Travel Coordinator (TC) determines shortest route round trip distance from home/work by using online mapping source (i.e. Map Quest)</li> <li>2. Traveler/TC visits <a href="#">State Travel website</a> to view the latest Memo related to mileage reimbursement rate.</li> <li>3. Traveler/TC runs, prints, and attaches Rental vs. Reimbursement calculator if trip is over 110 miles (<a href="http://www.enterprise.com/car_rental/corporateClassintro.do">http://www.enterprise.com/car_rental/corporateClassintro.do</a>) to the Authorization/Request for Out of State Travel form (SF 823)</li> <li>4. If the calculator shows it is more cost effective to:               <ol style="list-style-type: none"> <li>a) Rent - attach rental confirmation from Enterprise</li> <li>b) Reimburse - attach shortest route round trip directions as outlined above and the Rental vs. Reimbursement calculator</li> </ol> </li> </ol>	
<b>Lodging</b>	Maximum Allowable In-State Lodging Rate = \$89.00 <span style="float:right">*See Section 22 Lodging for tax instruction</span>	
<b>Overnight Per Diem/Subsistence</b>	Departure before 12:00 PM	\$26.00 for In-state \$32.00 for Out-of-State
	Departure between 12:00 PM and 4:30 PM*	\$13.00 for In-state \$16.00 for Out-of-State
	Departure after 4:30 PM	NONE for In-state NONE for Out-of-State
	Return before 12:00 PM, but after 7:30 AM	\$13.00 for In-State \$16.00 for Out-of-State
	Return after 12:00 PM	\$26.00 for In-state \$32.00 for Out-of-State
	*No subsistence is paid for travel segments that are less than 7 1/2 hours. Subsistence may not be claimed for same day travel. Overnight travel must be involved in order to claim subsistence.	
<b>Meals Provided Deduction</b>	If a meal is provided, no subsistence shall be claimed for that meal and is to be deducted as follows:	
	Breakfast = \$6.50 for In-state, \$8.00 for Out-of-State	
	Lunch = \$6.50 for In-state, \$8.00 for Out-of-State	
	Dinner = \$13.00 for In-state, \$16.00 for Out-of-State	
The State of Indiana must not pay for a person's meal more than once. This includes, but is not limited to, meals included in registration fees or by hotels in the room charge. If a person in travel status received a meal without charge, then the subsistence allowance must be reduced. However, no deductions from subsistence shall be taken for continental breakfasts or meals served on airplanes.		
<b>Overnight Per Diem/Subsistence for Other Countries</b>	<p>Travel to Specific Countries divide by four (4), one quarter is to be claimed for Breakfast, one quarter for Lunch and the remaining half (1/2) for Dinner.</p> <p>Other countries outside USA are to be claimed at fifty dollars (\$50.00), with the same departure and return times in the chart above applied. An original paid lodging bill is required to claim subsistence for over-night travel.</p> <p><u>Specific Country Daily Rates include:</u></p> <ul style="list-style-type: none"> <li>• Japan = \$90.00</li> <li>• Korea and Taiwan = \$85.00</li> <li>• China, France, Germany, Great Britain, the Netherlands, and Singapore = \$65.00</li> </ul>	
<b>Registration Fees</b>	A State Traveler may be reimbursed for the cost of registration fees associated with attendance at conferences. Only the State Traveler's portion of the registration fee, and no fees for any other individual accompanying the State Traveler, shall be paid.	
<b>Relocation/Moving Rates</b>	<p>Personal Automobile Mileage Rates:</p> <p>See <b>Mileage Section</b> for Rate per Mile for all approved business miles.</p> <p>\$0.235 per mile for relocation/moving expenses</p> <p>Mileage will not be approved for trips in excess of 2,500 miles. See Section 26. Relocation Services for additional detail.</p>	



**17. TRANSPORTATION OVERVIEW**

- A. When the State Travel is within the State or within two hundred fifty (250) miles of the State Traveler's station, the preferred traveling method ranks as follows when it is the most cost effective, efficient mode of transportation:
  - a. By State owned vehicle;
  - b. By rental vehicle through the state vehicle lease contractor;
  - c. A State employee may choose to drive their personal vehicle. You are instructed to check the terms and conditions of your personal vehicle insurance to assure coverage in the event of damage incurred while using your vehicle for State employment purposes. In the event you have not notified your insurance carrier that you use your vehicle for employment purposes, it is strongly recommended that you do so prior to engaging in such use.
- B. When the State Travel is outside the State and greater than two hundred fifty (250) miles from the traveler's home or station, whichever is closest, the preferred traveling methods rank as follows:
  - a. By commercial air (or State owned aircraft);
  - b. By other commercial transportation;
  - c. By State owned vehicle;
  - d. By rental vehicle through the state lease contractor;
  - e. A State employee may choose to drive their personal vehicle. You are instructed to check the terms and conditions of your personal vehicle insurance to assure coverage in the event of damage incurred while using your vehicle for State employment purposes. In the event you have not notified your insurance carrier that you use your vehicle for employment purposes, it is strongly recommended that you do so prior to engaging in such use.
- C. The cost of travel by railroad or bus may be reimbursed by submitting acceptable receipts with the travel claim. The cost of sleeping cars are not allowable for reimbursement. The travel time provisions of this Policy apply to train and bus travel.
- D. The cost of taxi and other public transportation between a person's station and a terminal may be reimbursed. However, the State will not reimburse the cost of taxi fare between the home and terminal in an amount in excess of taxi fare between the station and the terminal.
- E. The cost of transportation between the terminal, the place of lodging and other place of business may be reimbursed. The person must either itemize such trips on the travel voucher or submit a log of such trips with the travel voucher stating the nature of each of the trips.
- F. The cost of parking at a terminal may be reimbursed at long-term economy rates. A State Traveler may use a personal vehicle for transportation to a terminal instead of using public transportation and may be reimbursed the cost of round-trip mileage between the station or home, whichever is closest, and the terminal.
- G. Reimbursement for a second round-trip instead of reimbursement for parking at the terminal is allowable; however, reimbursement for a second round-trip may not exceed the avoided long-term parking fees.

**18. TRANSPORTATION - AIR TRAVEL**

- A. Agencies are required to make all Out-of-State travel arrangements in accordance with this policy. The Department must approve air travel prior to an Agency purchasing airline tickets.
- B. The coach class cost of travel by commercial air carrier will be reimbursed. Cancelled tickets carry a penalty fee and may be reimbursable if a legitimate emergency exists or if legitimate State Business prohibits the employee from traveling. Guidance shall be sought from the Department of Administration.
- C. An Agency must utilize the State Travel Contract Vendor's online booking tool and work with the Department to determine when tickets should be purchased by the State Travel Contract Vendor.
- D. The most cost effective, efficient airline ticket shall be purchased. If a direct flight is in the best interest of the State, either by cost or efficiency, it is to be utilized.
- E. Written approval from the Department is required before making arrangements for non-commercial or charter air transportation, as well as rental of any other commercial mode of transportation (bus, van, train, etc).

**19. TRANSPORTATION - VEHICLE TRAVEL**

- A. If the travel of an employee will be by vehicle, State owned vehicles shall be used when available. If the Agency does not have a State vehicle available, check the Department of Administration's Fleet Services Office at <http://www.in.gov/idoa/2458.htm>.
- B. When driving a personal vehicle, a driver will be paid a mileage allowance for travel starting from their home or station; whichever is closest to their point of destination, and as provided for by this Policy, since normal travel to work is not a reimbursable expense.
- C. Vehicle rental expense is reimbursable for travel when it is efficient and cost effective. Vehicle rental must be approved at the agency level for in-state travel and by the Department for out-of-state travel. The least expensive practical vehicle shall be rented utilizing the State Vehicle Lease Contract Vendor.
- D. The cost of renting a vehicle, in connection with travel by other modes of transportation, may be reimbursed if suitable local public transportation is not available or when rental is considered more advantageous to the State than the use of public transportation due to routing or scheduling considerations.
- E. If a vehicle rental is approved, the agency travel coordinator shall make advanced reservations for traveler utilizing the State vehicle contract vendor.



- F. Collision Damage Waiver (CDW), or Liability Damage Waiver (LDW), insurance covering use of the vehicle is a reimbursable expense if coverage is not included in the rental rate. The cost of any other insurance will not be reimbursed and such costs must be deducted from the claim for reimbursement.
- G. Initial payment of the cost of renting a vehicle is the responsibility of the person. The person may be reimbursed for:
  - a. the cost of renting the vehicle;
  - b. the cost of additional fuel;
  - c. the cost of Collision, or Liability, Damage Waiver (CDW) or (LDW) Insurance;
  - d. parking; and
  - e. tolls.
- H. Each item of cost must be supported by receipts required by this Policy. The claim for reimbursement must itemize the business usage of the vehicle, showing point-to-point travel, the same as for a personal vehicle. The person may be reimbursed for vehicle rental, excluding any personal usage.
- I. It is the responsibility of the traveler to make sure both the beginning and ending mileages are on the receipt.
- J. When utilizing a rental vehicle, SF 13696 is to be filled out upon return of the rented vehicle and turned into the employee's agency.

## 20. PARKING AND TOLLS

A person in travel status may be reimbursed for the cost of parking and tolls when using either a personal vehicle or a State vehicle. Valet parking will be reimbursable when "self-parking" is not available, or is cost effective and practical. (e.g., cost less, one fee with in/out privileges). Receipts satisfying the requirements of this Policy must be included with the claim for reimbursement.

## 21. MILEAGE

- A. State Traveler/TC completes and attaches Rental vs. Reimbursement calculator ([http://www.enterprise.com/car\\_rental/corporateClassIntro.do](http://www.enterprise.com/car_rental/corporateClassIntro.do)) to the Authorization/Request for Out of State Travel form (SF 823) or Travel and Expense TA if trip averages 110 miles per day. If the calculator shows it is more cost effective to:
  - a. Rent - attach rental confirmation from Enterprise.
  - b. Reimburse - attach shortest route round trip directions as outlined below and the Rental vs. Reimbursement calculator.
- B. If Reimburse:
  - a. State Traveler/Travel Coordinator (TC) determines shortest route round trip distance from home/work station by using online mapping source (i.e. MapQuest or Rand McNally).
  - b. State Traveler/TC visits State Travel website to view the latest Memo related to mileage reimbursement rate.

## 22. LODGING

- A. Preferred Lodging
  - a. Lodging arrangements with respect to State Travel shall be made in compliance with this Policy.
  - b. Reimbursement for In-State lodging is limited to the In-State Lodging Rate as set in this Policy, without the prior written approval of the Travel Office via written or electronic submittal.
  - c. Reservations for Out-of-State lodging shall be made through the Agency Travel Coordinator by the following options: 1) To use the state contract online booking tool or 2) The Agency Travel Coordinator to call the State Travel Contract Vendor.
- B. A person in travel status may claim reimbursement for actual lodging expenses not exceeding the single occupancy room charge, for overnight stays only.
- C. It is the traveler's responsibility to check out of the accommodations in sufficient time to not be required to pay additional expenses for late check-out.
- D. If accommodations are shared by "State Travelers"
  - a. The total room charge cannot be claimed by either traveler.
  - b. Each traveler shall request a hotel bill issued in the traveler's name
  - c. Each traveler shall claim a prorated share of the total room charge as listed on the traveler's individual bill.
- E. If accommodations are shared by non-State Travelers:
  - a. A separate bill need not be issued if the expense of lodging is being shared with another person:
    - i. The State Traveler can claim the total bill divided by the number of occupants, if applicable; or
    - ii. The State Traveler can claim the Single Occupancy Room Rate.
  - b. The State Traveler shall request the Room Clerk to record the payments and/or the Single Occupancy Room Rate on the hotel bill.
- F. A person may not claim reimbursement for lodging when the lodging was provided by another person who is not in the business of providing lodging.



- G. If In-State lodging is secured using an Agency Travel Card or a direct bill method, the Agency Travel Coordinator shall send a copy of the State Sales Tax exempt document to the hotel/lodging facility and ensure the name "State of Indiana" is listed on the reservation/bill. State Travelers are required to present the State's Sales Tax Exempt form to the hotel/lodging facility during check-in. Agencies are responsible to educate their State Travelers on any associated tax requirements (i.e. sales and innkeeper's tax) from the IN Department of Revenue Circulars.
- H. All State Travelers and those traveling on behalf of the State are urged to stay in hotels which offer reasonable government rates. These reduced rates must be requested of the hotel in advance. The State contract online booking tool may be used to secure reasonable government rates as well. Conference hotels may be utilized, but every effort must be made to secure any reduced rates. In order to receive government rates, the lodging establishment may require State Travelers to provide State government identification which may be in the form of a picture ID or a current payroll stub. The Department or Indiana State Budget Agency may disapprove full reimbursement if a good faith effort is not made to secure government or other reduced/reasonable rates or if the lodging expense exceeds the In-State lodging rate. The State Travel Contractor may be contacted to give assistance with locating economic lodging and guidance on reasonable rates in specific geographic areas.
- I. 50 Mile Restriction/Exception
- Except as provided below, a person is not entitled to lodging or a subsistence allowance for over-night travel if travel takes the person fifty (50) miles or less from the station or the person's home.
  - An Agency may only authorize payment of lodging and/or subsistence by making a determination that it may be dangerous or undesirable for a person to travel because of any one (1) of the following:
    - unsafe highway/weather conditions;
    - lack of public transportation and the person depends upon such transportation;
    - assignment of the person to police duty, arbitration or strike conciliation;
    - the employee's physical condition; or
    - with prior written approval from the Department, unusual work assignment.
  - The Agency must make the determination in writing, and a copy must accompany the travel claim.
  - At the discretion of the Agency, over-night travel is not necessarily required just because the mileage exceeds fifty (50) miles.

### 23. PER DIEM/SUBSISTENCE ALLOWANCE

A person in travel status is entitled to a subsistence allowance not to exceed the amount as provided for by this Policy and it must be made in compliance with this Policy. The State shall pay a subsistence allowance to a State Traveler for any day during which such State Traveler is in travel status for the required length of time. If lodging is provided to a person in travel status at no cost to the person this is to be documented on their reimbursement request and signed by their Agency.

### 24. STATE TRAVEL CARD, REIMBURSEMENT, AND PAYMENTS

The State shall only make a payment for or reimburse for State Travel to or on behalf of a State Traveler when in accordance with this Policy.

A. Purchase Orders:

State Employees Travel Expenses are never to be paid or reimbursed through a purchase order.

B. General Payment Terms and Conditions

The State may pay a State Travel expense to or on behalf of a State Traveler under the following terms and conditions:

- Payment of the State Travel expense is approved in writing by any person whose approval is required for authorization or ratification of the State Traveler within this Policy.
- The State Travel Expense has been authorized or ratified in accordance with this Policy;
- With respect to a State Travel Expense, the State Traveler submits an original receipt (unless otherwise approved by the Auditor's Office and/or State Board of Accounts) for the State Travel Expense along with such supporting documentation as required by this Policy and/or any other governing policy.
- Paying the State Travel Expense does not violate any law, statute, policy, circular or regulation, or court order; and
- The State Travel Expense was incurred in compliance with this Policy.
- If the Agency seeks the use of a State Travel Card for their Agency, the transactions must be compliant with the State Travel Card Policy, as noted in the Procurement and Travel Card User Manual shown on website: <http://www.in.gov/doa/2453.htm>.

C. State Travel Expense Limitations

- The State may not pay a State Travel Expense where another person or entity, other than the authorized State Traveler, pays the expense or subsistence allowance.
- If a State Travel Expense has been approved in advance by the appropriate State Agency and the Travel Office, the actual State Travel Expense incurred by the State Traveler is payable only to the extent it is less than or equal to the approved State Travel Expense.



- c. For Out-of-State Travel, if the actual expenses exceed the estimated expenses that were submitted for approval by fifty dollars (\$50) and if electronic approval was received, the reimbursement expense must be completed with the actual expenditures. If electronic approval was not received, the traveler must submit a new SF 823 form with the actual expenditures for approval by the Commissioner and the Agency. This requirement may be waived by the Department and appropriate State Agency if its enforcement, under the circumstances, would be unfair, inequitable, impractical, unreasonable or otherwise not consistent with the policies and principles underlying this Policy.
- D. Allowable Reimbursements – Legally Required  
An Agency or State Traveler may not receive, accept, or retain State Travel expense, lodging, transportation, meal or any other good or service with respect to State Travel that is provided by another person or entity who is not legally obligated to do so unless such receipt, acceptance, or retention is legal, ethical, and does not raise the appearance of impropriety. Any such expense, allowance, good, or service that has been improperly paid or accepted shall forthwith be refunded or otherwise paid for by the State Traveler.
- E. Allowable Reimbursements – Limitations  
Each person requesting reimbursement for State Travel expenses shall submit a claim covering only the person's own expenses. No reimbursement may be made for the expenses of another state authorized traveler. If the State Traveler is travelling with a ward of the state, pupil of a state institution, patient of a state facility, or an offender from a state facility (collectively referred to as "dependent"), the State Traveler may request for reimbursement for the travel expenses the State Traveler paid on behalf of the dependent. These expenses must be separately itemized and justified in the request for reimbursement.
- F. Reimbursement Rates:
- a. The rates of reimbursement for Travel Allowances shall be those established, in accordance with law, by the State Budget Director and adopted by the Commissioner.
  - b. Reimbursement rates for travel allowances, and/or maximum rates are illustrated in this Policy.
  - c. The rates of reimbursement for actual expenditure amounts actually expended, subject to any limits per the provisions of this Policy.
  - d. All amounts claimed must be converted to United States currency. Proof of conversion rate(s) at the time the expense was incurred must be submitted for expenses paid in any other currency.
  - e. In addition to the subsistence allowance, a person in travel status outside of the continental United States may be reimbursed for the reasonable expenses associated with the travel. Such expenses include, but are not limited to, the cost of:
    - i. Visa, passport and other travel documents;
    - ii. Photographs for travel documents;
    - iii. Inoculations;
    - iv. Currency exchange; or
    - v. Airport taxes.
- G. Travel Bonuses
- a. It is the policy of the State that any premium, bonus, or compensation acquired by any individual as a result of travel either paid for or reimbursed by the State under this Policy is the property of the State. This includes but is not limited to bonuses, premiums and compensation for the following:
    - i. Airline Travel;
    - ii. Other common carrier;
    - iii. Hotel or motel; and
    - iv. Rental cars.
  - b. Any individual who earns any compensation, premium, or bonus while the person is traveling for the State and is governed by this Policy shall turn in the compensation, premium, or bonus to the Agency. The Agency which is responsible for paying such expenses shall be considered to be the owner of the compensation, premium or bonus, and shall be entitled to the benefits of such travel bonuses, promotions, and the like. All such travel bonuses, promotions, and the like shall be reported to the Travel Office when they are being redeemed. Each Agency shall establish procedures to implement this policy and submit a copy of the procedures to the Department.
- H. Recovery of Expenses Erroneously Paid  
The State may recover any expense or allowance paid to any person or entity:
- a. which was erroneously paid for any reason;
  - b. which was paid because of illegality or fraud on the part of any person or entity; or
  - c. which was paid under the mistaken belief, at the time payment was made, that such payment was in accordance with this Policy.
- I. Preferred Travel Expense Method  
The State shall make payment when travel is by the preferred traveling method. The preferred traveling method is the least expensive or most cost effective means of travel which is also:
- a. Available at the time and place where it is needed;
  - b. Necessary for the State Travel involved;
  - c. Appropriate, sufficient, and timely for the State Travel involved;
  - d. Reasonably safe; and
  - e. Reasonably comfortable.



J. Claim Amounts:

Internal Revenue Service Publication 463, "Travel, Entertainment, Gift, and Car Expenses", requires for an "accountable plan" (not taxable) travel reimbursement, the employee must "account for your expenses within 60 days after they were paid or incurred". Thus, a travel expense report must be submitted to the Auditor of State for reimbursement within this time period.

K. Expenditure Classifications:

- a. For State Employees, Board or Commission Members:
  - i. Use Object 595110-595195 for In-State Travel
  - ii. Use Object 59510-59595 for Out-of-State Travel
- b. For All other Persons, Contractors, and Companies:
  - i. Use Object 595810-595960
- c. Relocation Expenses:
  - i. Use Object 595121

## 25. RECORD KEEPING

A. Requirements for Receipts

Except as provided below, a person requesting reimbursement for the actual cost of any item of expenditure must include an original paid receipt with the claim for reimbursement. (Most credit card receipts will not qualify as a receipt by themselves, but they can be used as a "Proof of Payment" if a lodging bill does not indicate it has been paid.) This includes, but is not limited to: lodging bills, passenger coupons, and taxi or cab receipts (including tip), all indicating "paid in full". Other items such as tip to airport porters are not reimbursable. Original receipts may not be altered, and to prevent distortion they may not be marked up with "High-Lighters". The type and acceptability of receipts are as follows:

- a. The type of receipts may be hand written or preprinted, but must be legible and conform to the following standards:
  - i. Written receipts:
    1. Must be signed by payee;
    2. Must indicate amount paid;
    3. Cannot contain alterations to dollar amounts;
    4. Must indicate purpose for payment;
    5. Must give name of payer; and
    6. Must give date of payment.
  - ii. Preprinted receipts:
    1. Must give name of payee;
    2. Must indicate amount paid; and
    3. Must indicate purpose of payment.
- b. Examples of acceptable receipts are as follows:
  - i. For lodging-a hotel/motel bill must contain the following:
    1. Name of payee and address of lodging;
    2. Number of persons in the room;
    3. Daily charge for the room;
    4. Date or room usage; and
    5. Indication that payment was made for the room
  - ii. For airfare-the passenger coupon portion of the airline ticket;
    1. Is required for either direct payment or reimbursement;
    2. Must indicate the name of the passenger; and
    3. Must indicate the routing and dates of travel.
  - iii. For taxi or cab fare, must also indicate the starting point and destination (e.g., airport to hotel)

B. Lost Receipts Procedure

If a receipt for any item of expense has been lost or is unobtainable, the following may be substituted:

- a. Airfare: documentation from the airline or travel agent
- b. Lodging: statement from provider or copy of lodging bill and paid receipt
- c. Moving: statement from provider or copy of moving bill and paid receipt.
- d. Other: Certificate of Missing Receipt (State Form No. 42275). A copy of this form has been distributed to each agency and should be used as a master for reproduction as needed. The form is to be attached to the claim for travel and must be approved by the Commissioner's designee.
- e. All claims for reimbursement which are accompanied by substitutions for original receipts must all be approved by:
  - i. For employees, the Agency Head and the employee's immediate supervisor;
  - ii. For contractors and board or commission members, the Agency Head;
  - iii. For the Agency Head, the Commissioner



### C. Claim Forms

All requests for reimbursement must be submitted on forms provided by the Agency and prescribed or approved by the State Board of Accounts. The forms to be used are travel vouchers for all State employees, Board or Commission members, and claim vouchers for all others. All vouchers must be pre-audited and approved by the Agency prior to be submitted to the Auditor of State's Office for payment.

## 26. RELOCATION SERVICES

### A. Coverage

This noted section is for claiming reimbursement for travel expenses incurred by any person who is required to move a household as a requirement of being employed by and/or continuing employment for the State. A State Traveler is entitled to payment of moving or relocation while in compliance under the following terms and conditions as provided for by this Policy:

- a. This Policy applies to all moving of households conducted on behalf of the State by current and/or prospective employees.
- b. Expenses are reimbursed for both current State employees and for prospective State employees.
- c. The required qualifications for the position must be submitted with the request.
- d. Reimbursement of expenses is limited to ESM SAM/PAT I, II & III positions and PAT or SAM/PAT Positions with Recruitment Differentials.
- e. Prior approval is required by both the Department and the State Budget Agency before the Agency can give the authorization for any move or relocation.

### B. Reimbursement for Moving Expenses Due to a Change of Work Station

If an Agency requires an employee to change to a new work station and as a result of the change the employee must relocate a residence, the employee shall be reimbursed for moving expenses under the following conditions:

- a. The employee must have been employed by the State for at least six (6) months prior to the required change of station except when the employee attends established training programs approved by the Department.
- b. Both the change of station and the change of residence must be greater than thirty (30) miles.
- c. The Agency Head must explain the Agency's need for the change of station.
- d. The Department must approve the change of station prior to the move.
- e. The approval by the Department shall be based on the following:
  - i. More economical to the State than assignment to a central branch or district office. Example: Station would be the center of proposed territory;
  - ii. Type of work – field work in a territory, etc.;
  - iii. Number of required days in the vicinity of permanent office;
- f. Reimbursement is also allowable if the change of station is required because the employee becomes employed by a different State Agency. The employing Agency may make:
  - i. The request;
  - ii. The determination of the Allowable Amount:
    1. Either the Allowable Reimbursement; or
    2. Actual Expenses up to the Allowable reimbursement; and
  - iii. Payment for the move;
- g. The allowable amount of reimbursement for a change of work station is limited to one-way mileage and one (1) of the following rates:
  - i. Moving Rate A = \$788 – if the employee moves an entire household;
  - ii. Moving Rate B = \$390 - if the employee moves an entire household using a State-owned vehicle; or
  - iii. Moving Rate C = \$234 – if the employee must move only minor household items and personal effects;
- h. To receive the allowable reimbursement, proof of the move must be attached to the travel voucher and shall include all original receipts when claiming actual expenses.
  - i. For Rate A this proof can be in the form of original receipts for the move from a moving company, for a lease-rental van, etc.
  - ii. For Rates B and C evidence of a change of residence can be in the form of utility bills addressed to the employee at both locations.
  - iii. It shall be the duty of the employee's immediate supervisor to secure sufficient information to be able to certify on the face of the travel voucher which of the above mentioned provisions apply and that the change of station was necessary.
  - iv. A copy of the prior approval must also be attached.

### C. Reimbursement for Interview Expenses

An Agency may reimburse persons seeking employment for interview expenses under the following terms and conditions:

- a. The commitment for reimbursement is at the discretion of the Agency Head, but reimbursement may not be promised to any person unless it is a necessary condition and only after it has had Administrative Approval as defined in the section below:
- b. The Agency Head must certify in writing that the interview of the person is in the best interest of the State.
- c. Administrative approval is required, in writing, prior to incurring the obligation, in the following sequence:
  - i. The Department, and
  - ii. The Budget Agency.



- d. The required qualifications for the position must be submitted with the request.
- e. Reimbursement of expenses is limited to ESM SAM/PAT I, II & III positions and PAT or SAM/PAT positions with Recruitment Differentials.
- f. Travel expenses for current and prospective employees will be reimbursed in accordance with this Policy and the rates in effect at the time of the travel.
- g. If lodging for overnight travel is approved, compliance with this Policy shall be explained to the prospective employee.
- h. A person shall only be reimbursed for one (1) trip related to each position interviewed.
- i. The number of persons interviewed for the same position should be limited to a reasonable number.
- j. The allowable reimbursement is limited to the usual travel expenses actually and necessarily incurred for the person only-either round-trip coach fare or mileage and up to two (2) nights including three (3) days of travel status, based on this Policy, subject to actual circumstances.
  - i. Arrangements for airfare must be secured through the Department's Travel Division.
  - ii. Transportation expense may include round trip mileage for one (1) personal vehicle.
  - iii. All Reimbursements, except food and mileage, shall be supported by original receipts.
- k. The claim for reimbursement for the Interview shall be processed upon completion of the travel.

D. Pre-employment Travel

- a. On occasion it is desirable and in the best interest of the State for an individual who has accepted employment with the State but has not actually begun work to attend meetings or otherwise engage in activities on behalf of the State. Examples include orientation sessions and scheduled meetings of a State board or commission with which the employee will be working.
- b. Expenses incurred in such activities may be reimbursed by a State Agency as a part of the Interviewing and Relocation Expenses so long as the expenses are in accordance with this Policy.
- c. Such expenses count towards the overall maximum limitation on interviewing and relocation expenses.

E. Reimbursement of Relocation Expenses for New Hires

- a. The commitment for reimbursement is at the discretion of the Agency Head, but reimbursement may not be promised to any person unless it is a necessary condition of employment and only after it has had Administrative Approval as defined in this Policy.
- b. The Agency Head must certify in writing that the hiring of the person is in the best interests of the State.
- c. Administrative approval is required, in writing, prior to incurring the obligation, in the following sequence:
  - i. The Department, and
  - ii. The Budget Agency.
- d. The required qualifications for the position must be submitted with the request.
- e. Reimbursement of expenses is limited to ESM SAM/PAT I, II & III positions and PAT or SAM/PAT positions with Recruitment Differentials.
- f. Request for Administrative Approval for relocation shall be accompanied by, at least, three (3) written estimates from either moving companies or equipment rental companies if it is a self-move.
- g. Prospective employees, who have never before been reimbursed for moving as a new hire by the State, residing outside the State may be reimbursed for these expenses.
- h. Prospective employees, who have never before been reimbursed for moving as a new hire by the State, residing inside the State seeking employment in excess of one hundred fifty (150) miles from the current home or station may be reimbursed for these expenses.
- i. Travel expenses for current and prospective employees will be reimbursed in accordance with this Policy and the rates in effect at the time of the travel.
- j. If lodging for over-night travel is approved, compliance with this Policy shall be explained to the prospective employee.
- k. The proper expense classification is 595121 and is to be paid from the account from which the person's salary will be paid.
- l. Relocation expenses are limited to the usual travel expenses actually and necessarily incurred for house hunting trips (including expenses of a spouse or equivalent) and transportation of household items and family at the time of the move.
  - i. House hunting trips may include airfare for up to two (2) persons, or round trip mileage, lodging for the family and subsistence for up to two (2) persons, subject to the prior approval.
  - ii. Arrangements for airfare must be secured through the Department's Travel Division.
  - iii. Transportation expense may include one-way mileage for one (1) personal vehicle.
  - iv. All Reimbursements, except food and mileage, shall be supported by original receipts.
- m. Based on the actual circumstances, the person may be approved for no more than three (3) nights of lodging, including the corresponding days of subsistence, for the combination of house hunting and moving.
- n. Payment of all necessary relocation expenses actually incurred may not exceed the lesser of Moving Rate D times the starting salary authorized for the position or Moving Rate E, less any payments for interviews or pre-employment travel to the same person.
  - i. Moving Rate D is 10%
  - ii. Moving Rate E is \$5,000.
- o. Reimbursement for relocation expenses will only be made after the employee has completed the move and paid all expenses. An original paid receipt, which either includes an itemized bill, or together with an itemized bill from the moving company, shall be attached to the claim for reimbursement.
- p. Agencies should strive to expediently process properly completed claims within two weeks or less.



**27 EVENT PLANNING**

- A. Agencies planning an event requiring 10 or more hotel rooms are to follow the below guidelines:
  - a. Visit IDOA Travel Services website at <http://www.in.gov/idoa/2459.htm> for current information on group reservations and event planning
  - b. Ensure proper procurement procedure is followed. Current training information can be found at <http://www.in.gov/idoa/2864.htm>
  - c. Contact IDOA Travel Services with questions at [IDOATravel@idoa.in.gov](mailto:IDOATravel@idoa.in.gov)

This Policy is hereby approved by:

Jessica Robertson,  
Commissioner, Department of Administration

Date: 9/16/16

Brian Bailey,  
Director, State Budget Agency

Date: 09/06/16