



# MARICOPA COUNTY INTERNAL POLICY

Policy Title:  <p style="text-align: center;"><b>GENERAL TRAVEL</b></p>	Policy Number:           A2313
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**I. PURPOSE**

To establish consistent procedures and define overall responsibility governing travel on County business.

**II. DEFINITIONS**

- A. Appointing Authority:** An elected official, the single administrative or executive head of a Department/Special District, or the designated representative authorized to act in this capacity
- B. Approved Lodging Facility:** A commercial place of temporary residence that meets GSA standards regarding fire safety.
- C. Base Mileage:** Round trip commuting distance between home and duty post.
- D. Department/Special District (Department):** A division of the County including Special Districts. Special Districts are the Flood Control District of Maricopa County, Maricopa County Library District and the Maricopa County Stadium District.
- E. Duty Post:** The place where the Traveler spends the largest portion of the regular workday or working time or the place where the Traveler returns on completion of special assignment.
- F. Elected Official:** A person who is chosen by ballot to an office or post of authority by eligible voters to represent them in a public capacity and perform the duties for which they were chosen. This also applies to whoever is appointed to fill a vacancy of an Elected Official.
- G. General Services Administration (GSA):** A federal agency responsible for the administration of the Federal Travel Regulations and for setting domestic per diem rates. The County uses these rates for Lodging, Meal and Incidental Expense reimbursements (see [www.gsa.gov](http://www.gsa.gov)).
- H. Incidental Expenses:** Fees and tips for servers, porters, baggage handlers and other personal service employees.
- I. Lodging Rate:** The base rate defined by the Vendor prior to the application of taxes, etc.
- J. Map Mileage:** Established mileage on a map between cities and towns.
- K. Meals:** Foods served and eaten in one sitting. These include breakfast, lunch and dinner. Continental breakfasts which only include donuts, bagels, muffins, juice, coffee, etc., are not considered a meal for purposes of this Policy.
- L. Per Diem:** A daily allowance for lodging (excluding taxes), meals and related incidental expenses.
- M. Reasonable Accommodation:** Any changes to the work environment, or to the manner or circumstances under which the position held or desired is customarily performed, that enables a Qualified Individual with a disability to perform the Essential Job Functions of that position without imposing an Undue Hardship on the County or imposing a Direct Threat to the safety of the individual or others in the workplace.
- N. Station:** Any airport, bus terminal, train depot, or similar transportation departure or arrival place.
- O. Travel Advance:** Funds advanced to the Traveler to meet anticipated travel expenses. A travel advance represents a lien against wages.

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- P. Travel Authorization and Expense Report (TAER Form):** [Form A2313taer](#) must be used for pre and post travel planning, authorizations, cost tracking and reconciliation when the Traveler will be in Travel Status. This form must be completed for all travel related expenses including but not limited to any registration, transportation, lodging, meals and incidental expenses directly related to travel. Expenses paid by the Traveler and the Travel Coordinator, and monies advanced to the Traveler, are tracked on the form and it is used to calculate reimbursement to either the Traveler or County at the conclusion of the travel.
- Q. Travel Coordinator:** A person designated by the Appointing Authority to plan, organize and manage the payment for Departmental travel and travel-related activities.
- R. Travel Status:** When a Traveler is conducting approved, County business at least 50 miles away from their designated Duty Post and the period of travel is expected to last a minimum of 12 hours. Travel status starts at the time the Traveler departs from their home, Duty Post or other authorized point and ends on the day the Traveler returns to their home, Duty Post or other authorized point.
- S. Travel/Training Card:** A non-fuel Purchasing Card (P-Card) used by Travel Coordinators as a means of paying for travel expenses, but not restricted from making other purchases which are authorized by the Procurement Code and Purchase Card Policy (See the [Office of Procurement Services' Purchase Card Policy](#)).
- T. Traveler:** The Elected Official, employee, or non-employee who is in County approved Travel Status or is seeking approval for County travel.
- U. Vendor:** One who sells goods or services.

### III. POLICY

#### A. Conditions for Travel

1. The purpose of the travel must be for the public's benefit and related to County business.
2. Travel must be completed within the Department budget approved by the Board of Supervisors or the appropriate Special District Board of Directors.
3. Travel is warranted when personal contact is the most effective method of conducting official County business.
4. Travel to conferences, seminars or meetings should only be approved when essential contacts can be made or significant information obtained that is important to the operation of the Department or to the enhanced performance of the Traveler.

#### B. Travel Arrangements

1. When travel is warranted, the Appointing Authority's approval is required prior to and upon completion of travel.
2. Departments should send the fewest number of Travelers possible to a given conference, seminar or meeting.
3. Travel may only be arranged by the Department Travel Coordinator or other authorized person designated by the Appointing Authority.

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4. Travel Coordinators and others designated to coordinate travel-related purchases, must be certified by the Office of Procurement Services before arranging any travel. Certification must be renewed every two years.
5. Nothing in this policy shall be interpreted to prohibit travel arrangements or reimbursements deemed a Reasonable Accommodation to the Traveler, in accordance with [County Policy HR2429 ADA/ADAAA Reasonable Accommodation for Applicants and Employees](#).

**C. Expenses and Reimbursement**

1. A Traveler may claim allowances and expenses for reimbursement as provided by law and County policy. Claims for unauthorized travel expenses will not be reimbursable.
2. Attendance at local conferences, seminars or meetings is not considered Travel Status, but is subject to reimbursement for mileage and seminar expense per this policy.
3. Travelers who knowingly and willfully submit falsified travel claims shall be referred to the appropriate Appointing Authority for disciplinary action.
4. Under no circumstances shall expenses for personal travel be charged to, or be temporarily funded by, the County. Any violations will be referred to the appropriate Appointing Authority for any necessary action.
5. Contractors (e.g., consultants), those who work with the County under a fee agreement (e.g., expert witnesses) and those who work with the County under letters of understanding or oral agreements (e.g., witnesses) are not considered employees of the County and are not otherwise covered by the terms of this policy except for employment candidates who are also subject to the conditions stated in §VI.E.4 of this policy. These individuals must follow the terms and conditions of their contract, fee agreement, letter of understanding or oral agreement.

**IV. AUTHORITY AND RESPONSIBILITY**

- A. Only the Appointing Authority or designee may approve travel requests for their Department and/or any advisory board or commission members serving their Departments. When the Appointing Authority is the Traveler, only the official at the next highest level in the organization may approve the travel request.
- B. Only the Appointing Authority or designee may approve a waiver to this policy. A request for a waiver must be in writing. If the Appointing Authority is the Traveler, only the official at the next highest level in the organization may approve a waiver.
- C. The Appointing Authority or designee may authorize an Employee to use their privately owned vehicle for County travel.

**V. TRAVEL GUIDELINES**

**A. Most Economical Plan**

1. All travel plans should take into consideration the most economical and safest travel and lodging, as well as the value of employee time.

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2. Travelers are encouraged to use the lowest available fares. For example, while Employees are not normally permitted to depart earlier or stay longer than required at County expense, this is permissible when the net effect is the same or lower cost for the trip and there is no significant loss of employee work time.

**B. Document Preparation**

1. Travelers are responsible for working with Departmental Travel Coordinators in the preparation of travel requests.
2. Each Department is required to complete and maintain all [TAER Forms](#) and supporting documentation for three (3) years after the fiscal year in which it was created or received (See the Arizona State Library, Archives and Public Records Retention Schedule for All Public Bodies # 000-12-25). Documents are not to be sent to Accounts Payable or Payroll.

**C. Compensation while in Travel Status**

Refer to [County Policy B7006 Hours Worked and Overtime](#) and [B7011 Hours Worked for Exempt Employees](#) for information on employee compensation while in Travel Status.

**D. Long-Term Travel**

The approval of the County Manager, or for Special Districts the Chairman of the Board of Directors, or their designees, is required for a Traveler when time in Travel Status exceeds seven (7) days. The Traveler is entitled to Lodging and M&IE according to GSA Per Diem, unless prior to the Traveler's departure the Appointing Authority has made, and the Traveler has agreed to other arrangements to accommodate the length of travel.

**E. Out of the Continental U.S. Travel**

The approval of the County Manager or, for Special Districts, the Chairman of the Board of Directors, or their designees, is required for travel out of the continental United States. Application must be made through the Traveler's Appointing Authority. The following conditions apply:

1. The Traveler may attend conferences, meetings, or seminars occurring outside the continental United States only if those of similar quality cannot be found within the continental United States within the year.
2. The maximum Per Diem will be determined by the Appointing Authority prior to the travel.
3. Before submitting their claim for reimbursement, the Traveler should contact the international division of a banking institution to determine the daily rate of exchange for the location to which they are traveling. Bills and receipts will be recorded in terms of the foreign currency. The rate of exchange in effect at the time the expenses were incurred will govern reimbursement.

**F. Change to Travel Plans**

Prior to entering Travel Status or during travel any change to travel plans must be communicated to the Travel Coordinator at the time the Traveler knows of the need to change travel plans or as soon as possible. After the completion of travel the Department must review each change resulting in additional expenses to determine who will pay for the additional expenses.

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**G. Completion of Travel**

All travel documents should be submitted to the Department Travel Coordinator for reconciliation within 14 days of completion of travel. If the completed [TAER Form](#) is not submitted to the Travel Coordinator within 60 days, further recovery actions and/or disciplinary actions may be instituted, including forfeiture of payments to the employee. An employee contesting the final rejection of an expense reimbursement request under this policy must comply with A.R.S. §11-622, Claims and Warrants.

**VI. PROCEDURES**

**A. Transportation**

1. Commercial-Air

- a. Transportation by scheduled airlines will be at the lowest available airfare rate, including baggage and other related costs, at the time of trip authorization. A fare other than the lowest rate may be used only when seats are not available at the lowest fare or air travel at a higher cost will result in an overall cost savings including cost of employee time. Payment via a County approved Travel/Training Card is the preferred payment method for these transactions. Expenses must be verified by receipts.
- b. Any promotional benefits or awards received from an airline, Approved Lodging Facility, rental vehicle company or with purchase of any other travel accommodation may be retained for personal use by the Traveler.
- c. Flight insurance purchased by the Traveler is not reimbursable.
- d. The use of privately owned and/or rented aircraft requires the prior approval of the County Manager or for Special Districts, the Chairman of the Board of Directors or the Chairman's designee.
- e. Chartered aircraft travel is allowed provided a common carrier (scheduled airlines, railroads, or intercity bus systems) is not available or an alternative mode of travel is impractical. Chartered air service may only be obtained from Federal Aviation Administration (FAA) licensed commercial flight operators. Chartered aircraft travel must be approved by the County Manager or for Special Districts, the Chairman of the Board of Directors or the Chairman's designee, prior to arranging travel.

2. Motor Vehicles

- a. Prior to and while using a vehicle for County business, the Employee must be in compliance with all County policies and procedures and applicable laws including traffic laws and insurance laws (See [County Policy A2310, Use of County and Private Vehicles and Equipment](#)).
- b. The use of rented motor vehicles must be for the advantage of the County and not solely for the personal convenience of the Traveler.

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- c. The comprehensive and collision liability insurance offered by the rental car company should be waived when renting a motor vehicle. The County's self-insurance program provides coverage for physical damage and liability provided the employee is driving within the scope of employment and following all applicable laws as outlined in the Revised Restated Declaration of Trust for Maricopa County, Arizona Self-Insured Risk Trust Fund. The County will not reimburse the purchase of comprehensive and collision insurance.
  - d. Rented motor vehicles are restricted to sub-compact, compact, or mid-size sedans unless a larger vehicle is necessary for cost efficiency because of the number of authorized Travelers.
  - e. Employees using their personal vehicles or County owned vehicles for travel must have obtained prior Appointing Authority authorization.
3. Acceptable Related Transportation Costs
- a. Bridge fees and tolls – list on the [TAER Form](#); no receipts required.
  - b. Gasoline – reimbursed when a rented motor vehicle is used; receipts required.
  - c. Mileage Reimbursement – refer to §VI.C.
  - d. Emergency repairs – for County vehicles only; receipts required.
  - e. Local Transportation – ground transportation including taxi, bus, limousine, airport shuttle etc., may be reimbursed if use is in the County's best interest. Receipts or written statements are required.
  - f. Parking – Short-term parking may be reimbursed with a receipt or written statement. Long-term parking may be reimbursed if the Traveler can demonstrate that it is less expensive to utilize long-term parking rather than to pay for round-trip airport shuttle or taxi service. If the long-term parking option is utilized, the Traveler shall provide a quote (may be a written statement from a verbal quote) from a shuttle or taxi service verifying the savings. It is the Traveler's responsibility to determine and use the most economical option for travel to and from the station. Receipts or written statements are required.
  - g. Airline Baggage Fees – At the discretion of the Appointing Authority, airline baggage fees of up to \$100.00 will be paid by the County in advance or will be reimbursed after completion of travel. If the Traveler has baggage fees in excess of the amount advanced, then the Traveler must provide receipts upon return for reimbursement. If the Traveler has baggage fees less than the amount advanced then the Traveler must reimburse the County the difference. Receipts are required in either case. Travelers should pack to avoid high baggage fees.

**B. Per Diem Expenses**

- 1. All County reimbursements for travel and related expenses are based on the established GSA rates. Meals and Incidental Travel Expenses (M&IE)
  - a. An allowance for meals (which includes tips) will be reimbursed at the GSA M&IE rate at the time of travel. Meals provided free on an airplane or included in the conference/seminar registration fees must be deducted from the allowance.



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- b. An incidental expense allowance for fees or tips will be reimbursed as outlined in the GSA M&IE. Examples of typical fees and tips include: fees and tips given to hotel employees including restaurant and room attendants, baggage carriers, airline flight attendants, etc.
  - c. Travelers are not required to submit receipts for Meals and only receive the allowed amount for Meals under GSA rules.
  - d. Additional incidental expenses (e.g., telephone, fax and copying charges) may be reimbursed if they are related to County business and are verified by a receipt. These additional expenses must be included on the [TAER Form](#).
  - e. Expenses incurred while in Travel Status for laundry, cleaning and pressing of clothing are reimbursable as miscellaneous travel expenses only after the Traveler has accumulated four (4) consecutive nights lodging in Travel Status.
  - f. Examples of non-reimbursable expenses include: in-room movies, valet service, valet parking, liquor, entertainment and long-term parking (except as outlined in §VI.A.3.f).
2. Lodging
- a. Lodging costs incurred within 50 miles of the Traveler's designated Duty Post or residence within Maricopa County cannot be claimed as a travel expense unless the lodging is in the best interest of the County and has been pre-approved by the Appointing Authority.
  - b. Lodging must be at an Approved Lodging Facility and the Traveler should always request the lowest available rate (e.g., government, corporate, conference). The Department Travel/Training Card should be used to pay for all lodging. In the event the Department cannot pay for the lodging using the Travel/Training Card, reimbursement is available through Payroll or, in an emergency, Accounts Payable.
  - c. To obtain reimbursement for lodging either through Payroll or Accounts Payable, the Approved Lodging Facility's original itemized receipt is required. Credit card receipts in lieu of the original receipt will not be accepted. Receipts must be marked paid or show a zero balance. Personal expenses must be paid by the Traveler and cleared from the final bill at checkout.
  - d. If lodging expenses could not be obtained at or below the GSA lodging rate, a request for a waiver of this rate must be approved by the Appointing Authority and attached to the [TAER Form](#). The request must explain why it is in the best interest of the County for the Traveler to stay at a particular facility (e.g., conference or training is at the facility and the cost of a rental car or taxi cab rides to the facility would equal or exceed the lodging rate listed by GSA). The decision to stay at the conference site cannot be made solely on the basis of convenience to the Traveler.
  - e. If the Traveler is required to stay at an Approved Lodging Facility that charges additional fees necessary for the conduct of County business (e.g., "resort fees," wireless access fees), the County will pay these fees and they will not be included as part of the GSA lodging rate.

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- f. Only the single room rate can be claimed for payment. If a room is shared by two or more Travelers, the entire room cost should be paid and the reimbursement claimed by one Traveler (if lodging costs are not paid in advance). A notation must be made on the [TAER Form](#) of each Traveler indicating which Traveler claimed the reimbursement for lodging costs.

**C. Mileage Reimbursement**

1. General Rules

- a. Approved travel using a vehicle must be performed by the most regularly traveled route as computed from highway map or odometer reading. Deviations from the most regularly traveled route must be documented, such as in cases of road closures.
- b. Mileage will be reimbursed at the mileage reimbursement rate set by the GSA.
- c. Employees will be reimbursed only for mileage in excess of Base Mileage.
- d. When two or more employees are traveling together for authorized purposes in the same vehicle, only one mileage allowance will be reimbursed.
- e. Repairs made to a privately owned motor vehicle will not be reimbursed by the County.
- f. The County may audit mileage requests to ensure validity and compliance with the policy and federal regulations.

2. Travel Status Mileage Reimbursement

- a. To claim mileage in conjunction with approved travel, the claim must be reported as part of the [TAER Form](#).
- b. When a privately owned motor vehicle is used for out-of-state travel, maximum reimbursement will be the lower of either the current mileage reimbursement rate or the lowest available airfare at the time the trip was authorized.

3. Non-Travel Status Mileage Reimbursement

- a. All non-Travel Status mileage reimbursements are processed for reimbursement through regular payroll and are included in the employee's regular paycheck. Payroll must have a completed [Mileage Reimbursement Form A2313mr](#).
- b. The Mileage Reimbursement Rate will be maintained in the payroll system and will be updated with any rate changes implemented by the GSA. The effective date of the changes will be determined by the County Manager.
- c. Requests for mileage reimbursement must be submitted to the Department Travel Coordinator no later than 60 days after the date the expense was incurred. Failure to comply with this requirement will result in the non-reimbursement of the request.

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**D. Advance Payments**

Payment of expenses prior to the scheduled travel dates will be processed using the following guidelines:

1. Payments to Outside Vendors

Advance payments to Vendors to pre-pay registration fees or hotel reservations should be made using the Department Travel/Training Card. If the Department is not able to use the Travel/Training Card (i.e., Vendor does not accept the Travel/Training Card), an original invoice or conference registration form and one copy must be attached to the payment voucher and these documents must be submitted to Accounts Payable for check payment. If the hotel does not accept the Travel/Training Card the travel advance should include the hotel rate and tax.

2. Payments to Travelers

Travel advances will be available to the Traveler on the Traveler's paycheck immediately preceding the travel dates. A travel advance for the total estimated budgeted expenses for the trip (less any pre-paid expenses) may be advanced up to 100% at the discretion of the Appointing Authority. Manual checks will not be initiated for travel advances. Each Department is responsible to ensure that travel plans are made in advance and adequate time is allotted to produce advances utilizing the regular payroll cycle. In emergency situations only, Accounts Payable will generate a check overnight. It is the Department's responsibility to provide Accounts Payable with a payment voucher and supporting documentation including a memo from the Appointing Authority explaining the need for payment and a copy of the [TAER Form](#) with all appropriate signatures.

**E. Travel Reimbursements**

Payment of any expenses upon return from scheduled travel will be processed using the following guidelines:

1. Payments to Elected Officials and Employees

After the travel has been completed, all documentation (e.g., original receipts, invoices, etc.) must be submitted and approved by the Department as required by this Policy. Receipts for meals are not required because a standard Per Diem allowance is provided. Reimbursement payments are made to Travelers through the payroll system and will be made within two pay periods.

2. Payments to Maricopa County and Special Districts for Unused Travel Advances

Travel Advances will not exceed the estimated amount of travel related expenses. If a travel advance was issued, and the travel expenses are less than the advanced amount, the difference between the two amounts must be returned to the County. The County must recover the funds via payroll deduction or via a personal check from the Traveler within two pay periods after travel is completed.

3. Payments from Terminated Elected Officials and Employees

Prior to the final paycheck issued to any terminated Employee, the Department shall ensure that all Travel Advances have been accounted for and repaid to the County. Any outstanding amount due shall be deducted from the Employee's final paycheck prior to issuance. It is the

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responsibility of each Department to maintain a register of advances and reimbursements to ensure control over all travel funds. If the Traveler is no longer an Elected Official or Employee, the Traveler shall deliver a personal check to be deposited by the Department in the appropriate fund. A matter of dispute or non-reimbursement may be referred to the County Attorney's Office for any necessary action and/or may be reported to the IRS as taxable income.

4. Payments to Employment Candidates

Upon receiving authorization from an Elected Official, the County Manager, or for Special Districts the Chairman of the Board of Directors or Chairman's designee, the Department recruiting for vacant positions may reimburse candidates for travel costs incurred for an employment interview. Reimbursement may include mileage, airfare, parking, meals, and where necessary, overnight accommodations. The following requirements and restrictions also apply:

- a. The Department shall demonstrate the public need for the position, that it attempted unsuccessfully to recruit for and fill the position from a pool of local candidates, that the requisite background and/or skills for the position in recruitment are highly specialized or are in critically short supply and the local labor market is highly competitive for the position in recruitment.
- b. The Department shall demonstrate that it has sufficient budgeted funds to cover all expenses to be reimbursed.
- c. Accommodations for overnight stays shall be scheduled directly by the interviewing Department's Travel Coordinator.
- d. Expenses for a spouse or companion shall not be reimbursed.
- e. Mileage for a personal vehicle will be reimbursed when the candidate's round trip mileage exceeds 240 miles and then only for those miles in excess of 240 miles. Reimbursement will be made at the current GSA rate.
- f. Employment candidates seeking reimbursement shall submit their documentation to the Department's Appointing Authority. Repayment of travel costs shall be processed directly by the recruiting Department and submitted to the County Finance Department.

**VII. ADDITIONAL GUIDELINES OR EXCEPTIONS FOR ELECTED OFFICIALS**

- A. As Elected Officials, and pursuant to A.R.S. §11-626, the Board of Supervisors are responsible to the taxpayers of Maricopa County. Therefore, there is no higher level authority within the County structure that can be defined as the Appointing Authority for the Board. To ensure appropriate checks and balances are in place, the Board of Supervisors is required to obtain the signature of another board member prior to the final reconciliation of travel documents and the payment of any related reimbursements.

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- B. For Elected Officials (except as defined above), travel will be authorized by the highest non-elected position or designee within their specific department.

Revision History

Version	Revision Date	Description of Revision
1	07 May 2003	Initial version (Approved by the County Manager)
2	28 Mar 2012	Revised definition of the "Approval Authority" to "Appointing Authority" to bring greater uniformity of the travel approval process County-wide, adds the use of "procurement card" to definitions, reorders, where appropriate, the listing of various County authorities to align with their proper chain-of-command, revises the methods for changing travel plans during travel to require more immediate justification and remove the exceptions for the Maricopa County Sheriff's Office. (C-18-03-016-6-01)
3	05 Jun 2013	Updates to comply with U.S. General Services Administration travel guidelines; mileage reimbursement form acceptance changed from 30 to 60 days; clarification provided on what fees are reimbursable or advanced to the employee. (C-18-03-016-6-02)
4	04 Apr 2017	Added Travel Coordinator certification requirement. Removed details of Mileage Reimbursement submission as replaced by Form A2313mr. Added reference for Reasonable Accommodations in travel arrangements. (Approved by the County Manager)