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KARUK TRIBE

Travel and Vehicle Use Policy Manual

As Approved:

May 7, 2002

As Amended:

August 5, 2002

April 18, 2007

February 14, 2008

April 30, 2008

April 21, 2011

August 4, 2011

September 29, 2011

Most Recent Approval:

January 22, 2013

**** This Amended Manual Supersedes All Other Versions ****

TABLE OF CONTENTS

Policy Jurisdiction.....	3
Authorizations.....	3
Areas Within the Tribe’s Jurisdiction	3
Areas Outside the Tribe’s Jurisdiction.....	3
Tribal Vehicle Use.....	4
Travel Safety.....	6
Tribal Vehicle Fleet and Procedures	6
Privately Owned Vehicle Use	7
Mileage Rates	8
Per Diem.....	8
Official Travel Procedures	9
Cancellations/Changes.....	10
Per Diem Rates	10
Unusual Circumstances.....	10
Conduct of Tribal Employee and Council Member	10
Economical Use of Travel Funds.....	10
Travel Outside of Normal Work Hours.....	11
Abuse of Policy.....	11
Written Reports.....	11
Use of Credit Cards	11

Travel and Vehicle Use

SECTION 1 POLICY JURISDICTION

- a) All Tribal personnel, including all entities (Housing and KCDC) and all members of the Tribal Council are bound by this policy.
- b) Anyone traveling on behalf of the Tribe and whose travel expenses are paid in accordance with this policy is bound by all provisions of this policy (ex; Tribal Council Members, Committee Members, etc).
- c) Anyone traveling on behalf of the Tribe who is compensated for travel as an additional charge for services is not bound by the provisions of this policy (ex; attorney, fee accountant, consultant).

SECTION 2 AUTHORIZATIONS

- a) Each trip to a destination outside the jurisdiction of the Tribe (as defined in Section 4), shall be specifically authorized by a motion of the Tribal Council approving the trip as essential to the conduct of the program involved. This requirement shall be accomplished either by:
 - 1) the Council's approval of the annual budget(s) which includes a line item travel for that specific trip; or
 - 2) authorization by motion for any travel which was not anticipated and/or scheduled; phone votes for travel will only be authorized in emergency circumstances and only if authorized by two Executive Council Members (conflict of interest applies).
- b) All travel advance request forms pertaining to the travel of Tribal staff, including interns for travel within the area of jurisdiction, must be approved by the supervisor and program director (if different than the supervisor).
- c) All travel advance request forms pertaining to the travel of the Chairman and Vice Chairman must be approved by an Executive Council Member (conflict of interest applies); approval can be obtained after the trip when prior approval is not possible.
- d) All travel advance request forms pertaining to the travel of a Council Member must be approved by the Tribal Council.
- e) All requests pertaining to the travel of any other person on behalf of the Tribe must be approved, in writing, by the Tribal Council.

SECTION 3 AREAS WITHIN THE TRIBE'S JURISDICTION

Travel is considered to be within the Tribe's area of jurisdiction if the destination of the travel is within states of California, Oregon, or Nevada.

SECTION 4 AREAS OUTSIDE OF THE TRIBE'S JURISDICTION

Travel is considered to be outside the Tribe's area of jurisdiction if the destination of the travel is outside the states of California, Oregon, or Nevada.

SECTION 5 TRIBAL VEHICLE USE

- a) Tribal vehicle use is limited to Tribal staff, Council Members and selected individuals as approved by the Tribal Council. Drivers must have a valid driver's license and be insurable under the Tribe's insurance policy. If an employee is removed from the Tribe's insurance policy, the employee must be terminated or transferred to a position which does not require operating a vehicle. Any type of moving violation by drivers must be reported to the Tribe immediately. Failure to do so within five (5) days will result in disciplinary action up to and including termination.
- b) All Tribal vehicle use not job related must be approved in advance by an Executive Council Member or vote of the Tribal Council.
- c) Any use of a Tribal vehicle must be reflected on a vehicle mileage sheet. Mileage sheets should be available in each vehicle. However, if a vehicle needs a new supply; they are available for printing on the Karuk Tribe's web site in the forms section. The approved driver is responsible for accurately completing a vehicle mileage sheet after each use. Information which must be included is as follows:
 - 1) Approved driver's name;
 - 2) Tribal Vehicle number;
 - 3) Odometer reading before use;
 - 4) Odometer reading when fuel is purchased;
 - 5) Odometer reading after use; and
 - 6) Destination and purpose of trip.

The approved driver shall turn in the vehicle mileage sheet along with any fuel receipts to the fiscal department after each use. Individuals who are assigned a vehicle full time may turn in vehicle mileage sheets and fuel receipts on a weekly basis. Fuel receipts that are turned in without a mileage sheet will be charged to the driver. Fuel receipts must be itemized with number of gallons and price per gallon.

- d) The fiscal department or other authorized employee will issue fuel cards to authorized drivers, and that person will be responsible for the appropriate use of the card.
- e) Fuel cards may only be used for fuel and only for Tribal vehicles.

All fuel receipts must be accompanied by a completed vehicle mileage sheet that includes the approved driver's name, vehicle number, odometer readings, and the destination and purpose of the trip. This includes VISA receipts also. Fuel receipts must be itemized with number of gallons and price per gallon.

Out of pocket expenses (such as oil, parts, etc.) will be reimbursed when approved by the Supervisor. These expenses will be reimbursed when a purchase requisition and receipt are

- submitted no later than five (5) days after the purchase.
- f) Authorized drivers are responsible for utilizing the vehicle properly.
- Unauthorized activities include:
- 1) Failure to obey speed limit.
 - 2) Failure to obey all rules of the road.
 - 3) Failure to drive responsibly and defensively.
 - 4) Carrying of unauthorized passengers must be approved in advance by an Executive Council Member or vote of the Tribal Council.
 - 5) Using a Tribal vehicle without prior authorization.
 - 6) Commuting with a Tribal vehicle between home and office.
 - 7) Leaving vehicle unlocked, with keys in the ignition, or running when unattended.
 - 8) When using a truck, no one may ride in the truck bed and all loads must be secured against shifting and loss.
- g) Authorized drivers are responsible for ensuring that all passengers are authorized. For travel within the area of jurisdiction, the following needs no approval:
- 1) Tribal employees, Council Members, federal employees and other persons conducting official business with the Tribe.
 - 2) In all cases, picking up hitchhikers is forbidden; in emergency situations you may assist stranded motorists.
- h) All occupants of a Tribal vehicle must wear seatbelts properly.
- i) Smoking is prohibited in a Tribal vehicle.
- j) Authorized drivers are responsible for any moving violations, offenses, fines or tickets received while the vehicle is in the driver's custody. Any tickets received pertaining to the condition of the vehicle (ex; bald tires, expired tags, non-working lights) will be the responsibility of the Tribe.
- k) If a Tribal vehicle is involved in an accident, the authorized driver is responsible for the following:
- 1) Getting help for anyone injured.
 - 2) Calling police. In the event of a non injury accident the authorized driver of the Tribal vehicle may exchange information with other driver(s), if no other driver(s), accident shall be reported to supervisor and not notify police.

- 3) Completing an accident kit including location, information about the other vehicle(s), property of people involved, estimation of extent of injuries or damages and an account of what occurred. **DO NOT ADMIT FAULT.**
- 4) Calling the Tribal office.
- 5) Remaining at the scene of the accident until the police release you from the scene.
- l) The authorized driver is responsible that the interior of the vehicle is trash free after each use. Subsequent drivers should report if the interior is not clean.
- m) The authorized driver is responsible for noting any needed maintenance of the vehicle in the vehicle log and reporting it.
- n) Use of a Tribal vehicle between home and the office without advance approval for each use is prohibited. No Tribal vehicle is to be stored at a place of residence unless it is advantageous to the Tribe and has been approved by an Executive Council Member (Chair, Vice Chair, or Secretary/Treasurer). Examples include when departure or return from travel occurs outside of Tribal office hours.
- o) No Tribal vehicle will be permanently assigned to any one employee or Council Member.
- p) Any authorized driver found to have been either 1) issued a citation for a moving violation (speeding, crossing the double yellow line, running a red light, etc.) while driving a Tribal vehicle, or 2) to be at fault in an accident while driving a Tribal vehicle, will be required to attend an approved traffic school; all driving privileges may be suspended if not completed in a timely manner. Traffic school will be required by the Tribe regardless of the Court's decision in the case and must be completed on the employee's own time and at the employee's own expense.

SECTION 6 TRAVEL SAFETY

- a) All travel is subject to weather and road conditions.
- b) All travel is stopped when snow is continually falling and staying on the roads, this means no transporting or other travel unless absolutely necessary. Inside duties will be assigned.
- c) When staff is caught in a winter storm during travel, staff will be expected to use good judgment, and his/her ability for hazardous driving techniques, to arrive at the destination safely.
- d) When a road condition exists that drivers may pass only at their own risk, staff has the right to choose not to pass.
- e) When vehicle tires are not in satisfactory condition, (determined unsafe), staff will not be allowed to utilize the vehicle.
- f) Slide precautions should be exercised so that staff does not become stranded.

SECTION 7 TRIBAL VEHICLE FLEET AND PROCEDURES

- a) All vehicles purchased or leased by the Tribe will be used for work or Council related activities.

- b) In an instance where a tribally owned vehicle might be used for another entity, for example, the Forest Service, it must be cleared with the Chairperson, and insurance requirements must be cleared with the Chief Finance Officer.
- c) In an instance where there is a potential reimbursement from another entity, such as the Forest Service, or another Federal or State entity, there must be a written agreement, signed only by the Chairperson. The written agreement must clearly indicate that the Tribe is to be the recipient the reimbursement, and that all payments must be made to the Happy Camp Administration Office.
- d) Under no circumstances shall an employee receive payment for the use of a Tribal vehicle or any other Tribal property, whether in cash or in exchange for products or services. Soliciting or accepting payment of any kind for the use of Tribal property may subject the employee to disciplinary action up to and including termination.
- e) All vehicles purchased or leased by the Tribe must be registered with the Karuk Tribe as the registered owner, and when necessary the lien holder as the legal owner.
- f) All vehicles purchased or leased under grant funds will be used only for the purpose for which it was granted. That purpose will be described in the project's application, except where modified by agreement with funding sources.
- g) The Tribe will be responsible for the proper use and maintenance of all vehicles.
- h) All vehicles purchased or leased by the Karuk Tribe will be covered at all times by at least the minimum insurance required by law.
- i) The Tribe will comply with the requirements of motor vehicle regulations enforced by the California Highway Patrol.
- j) Before the Tribal Council makes a determination of whether to purchase or lease a vehicle, quantitative documentation will be collected, that will demonstrate either a purchase or lease as the most cost effective.
- k) All Tribal vehicles will be assigned a base station where they must be parked at the end of each work day. Exceptions may be made on a case by case basis.
- l) All passengers and drivers of vehicles owned or leased by the Karuk Tribe shall wear their seat belts as required by applicable law. All Tribal policies and procedures including, but not limited, to the no smoking policy and the substance abuse policy shall be in full force and effect for all employees using or riding in the vehicles.
- m) The Executive Secretary/Administrative Receptionist or designated employee is responsible for the following:
 - 1) Scheduling use of all Tribal vehicles.
 - 2) Reporting any vehicle related problems to the automotive program.
- n) The Automotive Program is responsible for the following:
 - 1) Ensuring all vehicles are clean, properly maintained and that required maintenance is scheduled.

- 2) Ensuring mileage logs are reviewed and reconciled bi-weekly.
- o) The Fiscal Department is responsible for the following:
- 1) Ensuring all vehicles are properly insured and registered.
 - 2) Receiving, reviewing, and maintaining vehicle paperwork and travel documents.

SECTION 8 PRIVATELY OWNED VEHICLE USE

- a) Tribal employees or Council Members may use privately owned vehicles (POV) to conduct office business as follows:
- 1) If it is advantageous to the Tribe (ex; due to weather, Tribal vehicle unavailable, etc.).
- Note:** Based on Section 6 all travel is subject to weather and road conditions. **All travel is stopped when snow is continually falling and staying on roads.** Reimbursement for use of POV due to winter weather requirements (chains or 4WD required by road conditions) when comparable Tribal vehicle is not available for travel that is absolutely necessary will be at the full rate.
- 2) If POV is requested as a matter of personal preference instead of common carrier transportation (ex; airfare) and the mileage cost is comparable to that of common carrier transportation. If airfare is determined to be the least expensive, traveler may still utilize POV but will not be reimbursed beyond the cost of the airfare.
 - 3) If it is to and from the airport; reimbursement for such use will be at the full rate regardless of Tribal vehicle availability as it is not advantageous to have a vehicle unavailable because it is parked at the airport.
 - 4) If POV is utilized due to personal preference when Tribal vehicle is available, mileage reimbursements will be limited to 1/2 of the approved rates with the exception of to and from the airport.
 - 5) If more than one employee is traveling together in one POV, full mileage will be paid to the driver of the POV.
- b) Council Members are eligible to receive full POV mileage reimbursement, without prior approval, when attending board meetings or while conducting official business.
- c) POV mileage expenses will be reimbursed when a mileage reimbursement request is submitted for payment.
- d) POV mileage claimed may only include mileage incurred during the execution of official Tribal business.
- e) POV mileage will be calculated based upon the shortest route to the destination (utilizing map services such as Yahoo or Google), weather conditions and road closures will be considered.
- f) Any expenses incurred during the use of POV (ex; gasoline, oil, repairs, etc.) are ineligible for reimbursement.

- g) The supervisor or a designee is responsible for determining if use of POV is advantageous to the Tribe.

SECTION 9 MILEAGE RATES

Mileage will be reimbursed in accordance with current Federal reimbursement rates.

SECTION 10 PER DIEM

- a) Tribal employees and Council Members are considered to be in official travel status if they are approved to conduct official Tribal business, which requires them to be in travel status for more than twelve (12) hours either in or out of the area of jurisdiction.
- b) Ineligible expenses include:
 - 1) Common carrier transportation in excess of coach fare.
 - 2) Lodging, meals and incidental expenses in excess of expenses which would be incurred if the traveler used common carrier transportation.
 - 3) Personal phone calls in excess of the allowed rate of \$7.50 per day.
 - 4) Any lodging expense in excess of the single occupancy, conference/government room rate.
 - 5) Any vehicle rental fee in excess of the standard rate (ex; GPS units, car seats, etc.).
 - 6) Additional insurance elected on a vehicle rental (this is not required as all rental vehicles are covered by the Tribe's insurance policy when rented by employees for official business).
 - 7) Additional airfare costs incurred due to personal preference in dates of travel (ex; if traveler will be staying additional days on personal time).
 - 8) Any costs incurred for entertainment (ex; in room movies, etc.)
 - 9) Tips of any kind.
- b) If a traveler's personal preference results in excess travel time, the excess time shall be charged to annual leave, except in special situations approved in advance by the supervisor. If a traveler's personal preference results in excess travel costs, the excess costs shall be paid by the traveler.
- c) With prior approval of the Supervisor or Executive Director, travelers may have guests accompany them. All additional costs incurred due to this personal preference shall be the responsibility of the traveler (double occupancy lodging, airfare, etc.). Due to the fact that travel costs for non-employees are not allowable expenses in accordance with OMB A-87 payment arrangements shall be made to ensure that all costs are received prior to the departure date. Any costs not collected prior to the departure date will be deducted in full from the next payroll or stipend check.
- d) Advances may be approved prior to travel based on approved travel requests. Advances will be paid no earlier than ten (10) working days prior to travel to allow the Finance Department adequate time to process the travel. A travel advance form and backup documentation must be

submitted to the Finance Department with all appropriate approvals and necessary information.

- e) Travel is to be requested as early as possible to ensure the best rates. Travel requests should be made no later than (5) days before departure for local travel and no later than (14) days for any trips requiring airfare, when possible.
- f) Required receipts must be submitted to the fiscal department no later than ten (10) working days after official travel ends.

Travel expenses requiring receipts include:

- 1) airfare including baggage fees.
- 2) lodging.
- 3) taxi, shuttle, or rental cars.
- 4) gasoline for Tribal vehicles or rental cars; receipts for gasoline must be itemized with number of gallons and price per gallon.
- 5) any other incidentals not covered by per diem rates (e.g., parking, tolls).

Failure to submit required receipts within the required time frame will result in withholding the *entire* amount advanced from the next paycheck or stipend. Employees and Council Members may not be approved for subsequent travel advances until the travel reconciliation has been completed.

Such deductions will be eligible for reimbursement, if receipts are submitted, within 30 days of the original due date (10 working days after travel ends). Receipts submitted more than 30 days after the due date will not be eligible for reimbursement.

- g) If a completed travel reconciliation form indicates funds due to Tribe, the traveler has ten (10) working days to reimburse the Tribe. If the excess is not paid by the next pay period, it will be deducted from the next paycheck or stipend. Employees and Council Members may not be approved for subsequent travel advances until outstanding amounts are repaid.

If the completed travel reconciliation form indicates funds due the traveler, a check will be issued within ten (10) working days or the next pay period following return.

SECTION 11 OFFICIAL TRAVEL PROCEDURES

The Fiscal Department is responsible for the following:

- 1) Maintaining a schedule of all authorized travel and training.
- 2) Verifying that funds are available for requested travel.
- 3) Receiving and reviewing all travel documents, including requests for approval, advances and reconciliations.
- 4) Ensuring that all payments and reimbursements are made.

- 5) Reporting any problems to the supervisor.

SECTION 12 CANCELLATIONS/CHANGES

Advances paid for canceled travel must be repaid within five (5) working days of notification of cancellation or rescheduling. Failure to submit reimbursement within the required time frame will result in withholding the amount advanced from the next paycheck or stipend. The travel clerk must be notified within 48 hours of the cancellation if at all possible to allow for the proper cancellation of lodging, airfare, etc.

In the event that adequate notice is not given and a “no-show” charge is incurred, it will be the employee or Council Member’s responsibility to cover the charge, unless it is due to an unusual circumstance approved by the supervisor or Chairman or an Executive Council Members. Payment for such charges will be due within five (5) working days.

All costs incurred for non-business related change fees (airfare changes, early/late hotel checkouts, etc.) must be paid by the employee or Council Member.

SECTION 13 PER DIEM RATES

All per diem rates will be approved by the Tribal Council and these costs will not exceed approved federal government rates.

Eligible travel expenses will be paid based on actual cost. Lodging expenses incurred in excess of the maximum approved lodging rate will be the responsibility of the traveler unless it is determined to be an unusual circumstance (see 14 below).

Meals and incidentals (M & IE) rate will be applied in quarters as follows:

Departure Date - 3 quarters

Return Date - 3 quarters

Full Day - 4 quarters

Per diem will be adjusted for approved Business Meals for all travelers who received per diem and had their meal paid for. Business Meals must be necessary, approved by Supervisor, and the receipt must indicate the purpose of the Business Meal, who was present, and the date of the meal. Meal receipts must be itemized listing all food and beverages purchased.

SECTION 14 UNUSUAL CIRCUMSTANCES

Reimbursement of travel expenses incurred based on unusual circumstances must be reviewed and approved by the supervisor.

SECTION 15 CONDUCT OF TRIBAL EMPLOYEE AND COUNCIL MEMBER

When in official travel status, the traveler will conduct himself/herself in a professional manner. The traveler must be aware that he/she is a representative of the Tribe and act accordingly.

When attending training, attendance is required for the full course. If the traveler becomes ill and cannot attend a day of training or complete the course, he/she must contact a supervisor at the Tribe as soon as possible.

SECTION 16 ECONOMICAL USE OF TRAVEL FUNDS

To assure the most economical use of travel funds, travelers are requested to share ground transportation whenever possible. Travelers should make every effort to use the least expensive form of transportation available.

Rental vehicles will be used only when necessary to achieve the purpose of the approved travel and must be approved in advance by the Supervisor or Tribal Council. Every effort should be made to secure lodging in close proximity to the site so a rental vehicle is not required.

SECTION 17 TRAVEL OUTSIDE OF NORMAL WORK HOURS

Overtime is not allowed in conjunction with travel. Employees will be compensated their regularly scheduled hours at their regularly scheduled rate while in travel status. *Actual time* spent attending a conference or traveling on the weekend will be paid when it occurs during the employees regularly scheduled hours for a weekday (between the hours of 8 AM and 5 PM for most employees). Non exempt employees will be allowed to work a flexible schedule to avoid exceeding 40 hours in a payroll week (Sunday through Saturday) when travel will be taking place on the weekend.

SECTION 18 ABUSE OF POLICY

Any allegations of abuse of the provisions of this policy will be investigated to the fullest extent possible. Failure to abide by these policies may result in denial or restriction of use of Tribal vehicles and travel privileges. Violation or repeated violation shall be considered reasonable cause for termination of employment. In the event the violator is a member of the Council, the termination of the violator's term of office may be sought.

SECTION 19 WRITTEN REPORTS

All employees and Council Members attending meetings, workshops, seminars, etc., are required to prepare a synopsis of information obtained and evaluate the benefit of attendance. This training report must be submitted to the Supervisor or Council within thirty (30) days of return. It is the supervisor's responsibility to ensure the report is submitted to the Council.

SECTION 20 USE OF CREDIT CARDS

- a) Use of Tribally issued credit cards shall be for official business only. All receipts for use of the credit cards must be retained and submitted to the fiscal department at the conclusion of each trip or use.
- b) Each holder of a Tribally issued credit card will sign a statement agreeing to the following:
 - a. That the card shall not be used for any personal items under any circumstances, and that misuse of the card is grounds for disciplinary action up to and including termination. Emergency use will be allowed on a case-by-case basis without penalty, but the costs will be collected. The first offense will result in a payroll or stipend deduction for the amount of charges and a written warning; a second offense will result in cancellation of the card.
 - b. The card does not avoid the normal fiscal policies of the Tribe.
 - c. Any undocumented/unapproved purchases will be deducted from the cardholder's paycheck or stipend check(s) on a monthly basis, when the statements are reconciled; a courtesy reminder will be sent for missing receipts prior to taking a deduction.
 - d. Deductions will be eligible for reimbursement if receipts are submitted within 30 days of the original purchase. Receipts submitted more than 30 days after the purchase will not be eligible for reimbursement. This does not extend the timeline for submitting travel related receipts; see Section 10, Item F.
- c) When utilizing a Tribally issued credit card for travel costs, only approved expenses may be charged to the

card. Ineligible expenses may not be charged to the card; such expenses must be paid for separately (ex; room service, in room movies, tips, etc.).

- d) Fuel receipts must be itemized with number of gallons and price per gallon.
- e) Meal receipts must be itemized listing all food and beverages purchased.