

## OUT-OF-STATE TRAVEL POLICY

POLICY NUMBER: <p style="text-align: center;">810-01</p>	EFFECTIVE DATE: <p style="text-align: center;">3/1/2008</p>	APPOINTING AUTHORITY APPROVAL: <div style="text-align: center; font-family: cursive; font-size: 1.2em;">  </div>
REPLACES POLICY DATED: <p style="text-align: center;">New Policy</p>	AUTHORITY:	

### I. PURPOSE

This policy establishes limitations on out of state travel for the Department of Administrative Services (DAS) employees, such that time on the job here in Ohio is maximized. In general, out of state travel should be rare and occur only when a tangible benefit can be demonstrated.

### II. POLICY

#### A. PERMISSIBLE OUT of STATE TRAVEL PENDING APPROVAL

##### 1. Meets Tangible Benefit Criteria:

- a. Training that is not available in state, and is necessary for the proper completion of tasks assigned to the employee.
- b. Attendance at meetings where state or departmental interests require attendance due to direct involvement of the state.
- c. Attendance at meetings that may not be required (no direct involvement of the state or department), but the meeting is deemed to have a tangible benefit because of significant state or departmental interests.

##### 2. Attendance at Annual Meeting of Designated National Associations:

- a. Each division is responsible for submitting annually a list of national associations in which it maintains a membership to the DAS Director's Office.
- b. Lists are subject to approval by the Director of DAS.
- c. Out of state travel to annual conferences of approved national associations is permissible pending approval.
- d. Attendance to such conferences should be limited to one person unless otherwise authorized by the Director.

3. Security, Federal Requirements, Support of First Responders:

- a. Necessary for the purpose of security, meeting federal requirements, and/or to develop and/or maintain support of the First Responders.

B. OUT OF STATE TRAVEL REQUESTS

1. All travel outside of Ohio by DAS employees must be authorized by the Director of DAS or his/her designee.
2. Each employee requesting approval to travel out of state shall complete and submit Office of Budget Management (OBM) form OBM 4501, "Out-of-State Travel Request."
3. A copy of the agenda, program, course description, or letter of invitation must be submitted along with form OBM 4501.
4. A brief statement and any supporting documentation indicating why the travel meets the requirements of this policy must also be included when submitting form OBM 4501.
5. OBM 4501 and all necessary documentation shall be submitted to the employee's supervisor no later than one (1) month in advance of travel.
6. OBM 4501 should be obtained from OBM's website to ensure the most current form is used. (<http://www.obm.ohio.gov/forms/obm4501.pdf>)

C. SUBMISSION and APPROVAL of OUT of STATE TRAVEL REQUESTS

1. All out-of-state travel requests are to be submitted to the employee's immediate manager/supervisor.
2. Manager/supervisor must determine if the out-of-state travel is allowable in accordance with provisions in section II-A. If training is the reason for the travel, assurance must be made that it is directly related to functions that are currently or planned to be a part of the employee's job responsibilities. Manager/supervisor will review request for timeliness, completeness, correctness and inclusion of all necessary documentation. Employee's manager/supervisor shall approve the request after aforementioned requirements are met.
3. Manager/supervisor shall prepare a justification for the deputy director about the reason for travel.
4. Manager/supervisor forwards request form and all documentation to the division business manager.
5. Division business manager reviews material for technical and substantive compliance with this policy and forwards request and all documentation to the division deputy director for division approval.

6. Once approved by the deputy director, the division business manager forwards the request and all documentation to DAS Finance for review.
7. DAS Finance forwards the request to the DAS Director's Office for final agency approval.
8. All approvals must be obtained prior to incurring any expenses for registration fees, room expense, airline tickets, etc.
9. Requests may be denied for operational reasons, budget constraints or for other administrative or management concerns.

#### D. NOTIFICATION OF APPROVAL/DENIAL OF REQUESTS

1. Upon approval/denial of a request, the director's office returns the out of state travel form indicating the decision to DAS Finance who will notify the requesting division business office.
2. The business office will return the approval/denial to the supervisor.
3. The supervisor will inform the employee of the decision.

#### E. REIMBURSEMENT for OUT of STATE TRAVEL EXPENSES

1. Refer to OBM and DAS Office of Finance policies and procedures for obtaining reimbursement of approved travel expenses.

### III. MAINTENANCE

#### A. APPROVED REQUESTS SHOULD BE FILED WITH THE OFFICE OF FINANCE

#### B. TANGIBLE RESULTS TO BE NOTED AS APPROPRIATE ON EMPLOYEE PERFORMANCE REVIEWS

### IV. INQUIRIES

Direct inquires about this policy to:

Business and Policy Manager  
DAS Office of Finance  
30 E. Broad Street, 40<sup>th</sup> Floor  
Columbus, OH 43215  
Telephone: 614.644.1724  
FAX: 614-728.2541

**V. REVISION HISTORY**

Date	Description of Change
3/1/2008	Original Policy Effective