


2012.01	Travel Request Standard Operating Procedures	
<p><i>This procedure is for internal use only and does not enlarge an employee's civil liability in any way. The procedure should not be construed as creating a higher duty of care, in an evidentiary sense, with respect to third party civil claims against employees. A violation of this procedure, if proven, can only form the basis of a complaint by this department for non-judicial administrative action in accordance with the laws governing employee discipline.</i></p>		
<p>Related Policies: This Policy replaces Chief's Memo, Adherence to Procurement Policies and Procedures Concerning Travel, Dated November 1, 2024. County of Hawai'i Purchasing Manual. Purchasing Card (pCard) Program and Procedures Manual. Spending Guidelines Memorandum 24-08 dated November 1, 2024</p> <p>Applicable HI Statutes: none</p>		

I. PURPOSE

To ensure strict compliance with the County of Hawai'i's procurement policies and procedures related to travel. This SOP serves to maintain regulatory adherence, avoid non-compliance issues, and uphold the integrity of the Hawai'i Fire Department.

II. APPLICABILITY

This procedure applies to all Hawai'i Fire Department personnel who engage in travel-related activities, including but not limited to attending conferences, training, and any departmental travel requiring financial commitments.

III. POLICY

1. Pre-Approval Requirement:

- a. No travel-related purchases or arrangements, including conference registrations, transportation, or lodging, shall be made before obtaining full approval.
- b. All personnel must secure necessary authorizations through the established chain of command, culminating in approval from their immediate supervisor.
- c. The Fiscal section must confirm authorization before any procurement can proceed.

2. pCard Usage and Travel Compliance:

- a. Personnel must ensure all travel expenses comply with County procurement regulations and pCard policies.
- b. Any purchases made without prior approval may lead to an immediate revocation of pCard privileges and the cancellation of current or future travel plans.

3. Procedure:

a. Travel Request Process:

- Submit a formal travel request to the head of the requestor's division, ensuring it aligns with departmental objectives.
- The travel request shall briefly but clearly articulate the following:
 - The curriculum.
 - The dates of the travel and training.
 - The reason for the travel.
 - How the Training will benefit the Department.
- Await written approval from your supervisor and clearance from the Fiscal section before initiating any financial transactions.



b. Documentation and Record Keeping:

- Maintain accurate records of approvals, receipts, and related documentation as per County guidelines.
- Refer to the Purchasing Manual for detailed procedural instructions.
- All financial forms are available at the Internal HFD Website (Sharepoint) located at (<https://hiconity.sharepoint.com/sites/Fire>) . On the top navigation bar, click on the “Fiscal” tab, then click on the Travel Forms button. This will open the location of where the most up-to-date required forms are located.
- HFD Approval for Travel Form: The traveler must complete this form for inter-island and out-of-state travel, submit for approval through the chain of command. The Fire Chief will sign off on the Travel Form if it is approved.
- Submitting Travel Request to Fiscal: When the HFD Travel Form is approved, the traveler will go to the Fiscal page on Sharepoint and select the option to “Submit a Travel Request through ClickUp.” The traveler will complete the travel request form on ClickUp and attach the approved HFD Travel Form, and all relevant documentation.
- Out of State Travel: Fiscal will prepare the estimates for form F-106 Request for Out of State Travel and the traveler will provide the Justification for the travel and sign. Fiscal will also prepare parts of form F-115 ERC form OST, and the traveler shall complete the Justification and Impact if Denied explanations.
- Out of State travel must be approved by the Expenditure Review Committee and the Mayor’s Office prior to any travel arrangements being made.
- Airline travel:
- Boarding Passes: Boarding passes shall be submitted to Fiscal immediately after travel.
- Receipts: All receipts for travel-related expenses shall be submitted to Fiscal within 5 days of the completion of the trip. These receipts include Lodging, Parking, Rental Car, Fuel, Baggage, and any other approved expenses.
- Lost Receipts: If a required receipt is misplaced, lost, or destroyed, a notarized Affidavit shall be submitted to the Fiscal Branch as soon as practical.
- RAE Form F-109: If there is a deviation from standardized approval for travel-related expenses, i.e. requesting rental car larger than a compact car, the RAE Form F-109 shall be submitted with the HFD travel request and approved by the Finance Director prior to the travel date.

4. **Responsibilities:**

- a. Personnel: Must adhere to this SOP and secure necessary approvals before any travel procurement.
- b. Supervisors: Responsible for reviewing and endorsing travel requests before submission to the Fiscal section.

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c. Fiscal Section: Ensures compliance with procurement regulations and provides final authorization for travel arrangements.

5. Review and Revision:

This policy shall be reviewed periodically or as necessary to ensure it remains current with best practices and legal requirements.

-End-

Link:

[Fire - Travel Forms - All Documents](#)