

TRAVEL PROCEDURES

Your how-to step by step guide when you travel for the district

TRAVEL TRACKER—STEP 1

- Your first stop when you know you must travel is Travel Tracker. A link to Travel Tracker is available on the district website. From the homepage, click on “Staff Resources”, then “Human Resources”, then click on the blue area labeled “For files and info related to Travel and Travel Expenses, [please click here](#).” Every trip you take must be approved through the use of Travel Tracker. **THERE ARE NO EXCEPTIONS!**
- Day trips in the state and less than 150 miles away require administrative approval and must be entered in Travel Tracker at least 7 days prior to your expected departure. All overnight travel, out-of-state travel, and travel more than a 150 mile radius require Board approval and must be entered in Travel Tracker by Wednesday of the week before the Board meeting. Board meetings are scheduled for the second Thursday of each month. Travel Tracker provides a process to receive all necessary approvals.

TRAVEL TRACKER CON'T

- Please complete your request in Travel Tracker with as much detail as possible and as far in advance as possible. If other employees are traveling with you, please include their names in your request. There is a field in the request that specifically asks you to list the names of employees traveling with you.
- If you are traveling alone, plan to use your personal vehicle.
- If you are traveling with other employees you may request a Board vehicle. Board vehicles are never guaranteed and are assigned based on availability. A gas card may be requested if a Board vehicle is being used and can be requested through Travel Tracker and picked up at the Central Office no more than one day prior to your scheduled departure

STEP 2 REGISTRATION FEES

- Once your trip is approved (you will receive a confirmation email from Travel Tracker stating that your trip has been approved), work with the appropriate department to arrange for the payment of registration fees. Most of the time this will be with a PO. Registration fees cannot be reimbursed through the Expense Reimbursement Form.

STEP 3 HOTEL STAY

Hotel Stay—3 ways to pay

1. You must call and find out whether or not the hotel you will be staying at accepts purchase orders (PO). If your hotel accepts a PO then you will work with the finance secretary at your location or the administrative assistant to the appropriate grant administrator to submit a purchase requisition (PR). Your PR will be processed and you will receive a PO. You will take a copy of your PO with you to the hotel. Payment will be made to the hotel when the hotel bills the district. In the event that the bill is sent to you from the hotel, please attach it to the pink copy of your PO and submit it to the accounts payable department.

STEP 3 HOTEL STAY CON'T

Hotel Stay—3 ways to pay

2. Some hotels that will **NOT** accept a PO will accept a check upon check-in. In this instance you must request a Pro Forma invoice from the hotel showing the exact amount of your stay without state sales tax. Then you will work with the finance secretary at your location or the administrative assistant to the appropriate grant administrator to submit a PR. Please communicate with the accounts payable staff at the central office when submitting your PR to let them know that a check will need to be printed to take with you. All payments must be Board approved and therefore your PR must be submitted at least one week prior to a Board meeting to insure the payment can be approved and a check can be printed prior to your trip. Checks will be ready for you to pick up prior to your trip and will include a tax exempt certificate to submit to your hotel. Once your stay is complete, the hotel will give you a checkout receipt showing your charges and your payment. This receipt should be attached to the pink copy of your purchase order and returned to the accounts payable department.

STEP 3 HOTEL STAY CON'T

Hotel Stay—3 ways to pay

3. You may also use your personal credit card to pay for your lodging expenses and request reimbursement when you submit your travel expense report at the completion of your travel.

This is the preferred method.

❖ *If a hotel will not accept a PO or a check upon check-in, this is your only option unless you stay elsewhere.*

STEP 4 VERIFY TRAVEL

- Verify your substitute and lodging arrangements prior to your trip.
- In addition, if you have requested use of a Board vehicle you must check the status of your request in travel tracker 3 to 5 days prior to your scheduled trip. Click on “Calendar” in travel tracker and check the date of your scheduled trip to verify whether or not a vehicle has been assigned.
- Remember, Board vehicles are never guaranteed for staff travel.

STEP 5 SUBMIT TRAVEL EXPENSE REPORT

- A travel expense report must be completed for all expenses incurred on a trip when an employee wants reimbursement. This form can be found on our website under “Staff Resources”, then “Human Resources”, then click on the blue area labeled “For files and info related to Travel and Travel Expenses, [please click here.](#)” Please fill this form out completely and make sure that you are using the current form. This form is updated quarterly with current state mileage rates so DO NOT print these out in advance.
- Travel expense reports must be submitted within one week for reimbursements from School Activity Funds or 30 days for all other funding sources. Ideally, employees will submit their travel expense reports as soon as possible after returning from a trip. The longer they take to turn it in, the longer it will take for them to be reimbursed. In June, travel expense reports should be turned in as soon as possible after a trip has been completed to allow all expenses to be paid out prior to the end of the fiscal year.

STEP 5 SUBMIT TRAVEL EXPENSE REPORT CON'T

- Food will be reimbursed up to **\$35 per day** for all in-state travel and **\$45 per day** for out of state travel. You may also request reimbursement for gratuity. 20% gratuity is the maximum that will be reimbursed and meals plus tips must not exceed the daily allotment. Meal reimbursements require itemized receipts (food must be listed) no matter how much you are spending (even amounts under \$5). Meals will not be reimbursed for day trips where an overnight stay is not required. Please ask for separate receipts if you are traveling and/or dining with others. The receipts you submit should have your meals only listed.
- Overnight lodging will only be reimbursed for trips more than 100 miles from the Central Office. Certain exceptions will be made if an event fewer than 100 miles includes evening activities. All charges must be substantiated by a receipt.

STEP 5 SUBMIT TRAVEL EXPENSE REPORT CON'T

- Employees may also request reimbursement for certain incidental expenses such as parking or toll fees. All charges must be substantiated by a receipt.
- Reimbursements are made the day after the Board meeting. Only travel expense reports submitted by the 25th of the month are guaranteed to be processed at each Board meeting.
- ❖ *Expenses eligible for reimbursement are available in Board Policy 03.125 and 03.225 which are linked in this Travel Procedures Section.*