

COMPENSATION AND BENEFITS:  
EXPENSE REIMBURSEMENT

DEE (REGULATION)

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TRAVEL  
AUTHORIZATION AND  
PLANNING

Each District employee who is authorized to travel assumes responsibility to limit travel expense claims to those actually incurred on travel that is clearly for the purpose of discharging essential official business of the District. Planning of day-to-day travel should take into consideration the most economical means of accomplishing the authorized task.

Administrators who are responsible for authorizing travel plans have the additional responsibility of limiting travel plans to those trips that are clearly in accordance with Board policy, the District Strategic Plan or official Board action. Travel reimbursement requests for travel to training and/or conferences must be documented with proof of attendance.

Employees must secure written approval for travel on the CARROLL ISD TRAVEL REQUEST form.

TRAVEL EXPENSE  
REIMBURSEMENT

The following travel expenses are **not** reimbursable:

Travel from the home of the employee to school or the place of official business and travel back to the employee's home. Also not reimbursable is travel from the employee's home to any CISD facility, regardless of whether it is the normal place of business for the employee.

Travel incurred during the employee's vacation period, except to participate in meetings called by the Commissioner of Education.

Travel to participate in meetings of civic or social organizations unless authorized by the Board of Trustees.

Travel to meetings of professional organizations unless requested by the District or approved by the Superintendent or designee.

Travel not elsewhere described as a reimbursable purpose.

Written approval for travel must be secured by employees on the CARROLL ISD TRAVEL REQUEST form.

## HOTEL

The cost of the hotel room will be reimbursable (up to a maximum of \$85.00 per day per employee) provided the travel's reimbursement claim is submitted with a "paid" bill or receipt from a commercial hotel, motel or other commercial lodging establishment. Exceptions may be made for amounts above the \$85.00 maximum only upon prior approval of the Superintendent. The District will not pay for room service, movies, personal telephone calls, or other types of personal services.

The District will not pay the travel expenses of spouses and other persons who have no responsibilities or duties to perform for the District when they accompany a District employee.

Note: If more than one employee is sharing the expense of a single hotel room, the number of employees sharing the room may be used to find an average cost that falls below the \$85.00 requirement. If the average cost for the room falls below this maximum, the requirement for prior approval to exceed the maximum by the Superintendent is waived.

## MEALS REIMBURSEMENT OVERNIGHT TRAVEL

Employees who are traveling using local funds (non-grant) are not required to submit receipts for their meal expenses but will receive a per diem. Employees traveling using grant funds must provide detailed receipts for all meals.

Partial reimbursement will be made for meals only to the maximum amount established below when travel does not cover a full day:

- a) Breakfast - \$7
- b) Lunch - \$12
- c) Dinner - \$17

To be eligible for a meal reimbursement, the traveler must be out of the district, on district business.

## MEALS REIMBURSEMENT FOR NON- OVERNIGHT TRAVEL

Reimbursements for meal expenses incurred during non-overnight travel are considered income and must be included in an employee's taxable wages and reported on his or her Form W-2, unless the traveler is accompanying students.

Staff may be reimbursed for approved, necessary, and reasonable business meal expenditures incurred in connection with approved travel or school-related business on behalf of the District.

Business meals are those taken with non-District professionals to

discuss school-related business. A receipt must indicate the date of the meal, the name and location of the restaurant, attendees and reason for the meeting, and the employee's signature.

#### REGISTRATION FEES

Registration fees paid by the employee will be reimbursed. The employee must submit information explaining the date of the event, topic and reason attendance at the event will benefit the district. Additionally, upon return to the district, the employee must provide proof of attendance.

#### PUBLIC TRANSPORTATION

Actual costs for public transportation will be reimbursed. Employees, when traveling by commercial airlines, must travel coach class when such space is available. Receipts for public transportation must be attached to the traveler's expense report.

Taxi costs are considered public transportation and expenses will be reimbursed at actual cost. Receipts must be submitted for all trips.

Car rentals will be reimbursed at actual cost. Receipts for car rental must be attached to the traveler's CARROLL ISD TRAVEL REQUEST form. A detailed statement of justification for the car rental, indicating the places visited and the persons contacted must be attached to the expense account report.

#### DISTRICT VEHICLES

An employee who travels in a District vehicle will follow administrative guidelines for using the vehicle, mileage claims, and gas usage.

#### PRIVATE TRANSPORTATION

All authorized transportation outside the district in the employee's vehicle will be reimbursed at the current Texas Comptroller's allowable amount per mile. The District has chosen the Mapquest mapping system to document mileage reimbursements. A Mapquest printout with the mileage from the point of origin (district address) to the point of destination shall be printed and attached to the Travel Authorization form. Alternately, the District provides a mileage calculator which has mileage listed for many popular travel destinations.

It is the employee's obligation to have a valid Texas Driver's License and valid insurance on the vehicle that meets requirements of the State of Texas.

Maximum Reimbursement: The maximum reimbursement using a privately owned vehicle will be the lesser of

1. the mileage at the comptroller's stated reimbursement amount, or
2. the amount that the employee would have incurred by using the lowest available airfare and associated public transportation to the destination and any return transportation expenses associated.

When four or fewer employees travel on the same itinerary, only one may be reimbursed for mileage. When more than four employees travel on the same itinerary, only one out of every four may be reimbursed for mileage. Exceptions may be considered and approved by the Assistant Superintendent for Financial Services.

#### PARKING COSTS

An employee who drives a car to a meeting and is required to pay a parking fee for the automobile will be reimbursed provided a receipt is submitted with the employee's CARROLL ISD TRAVEL REQUEST form.

#### MISCELLANEOUS EXPENSES

The District may reimburse for toll expenses, when receipts are provided for documentation purposes.

The District will not reimburse an employee for other miscellaneous expenses, such as gratuities, tips and the like.

#### REIMBURSEMENT DEADLINE

The District will make reimbursement for properly documented expenses only if the request for reimbursement is submitted to the Financial Services Department on the appropriate forms, with any necessary receipts attached, no later than 10 days after the trip.

#### TRAVEL ADVANCES

If funds are requested in advance of travel, the following procedures may apply:

1. The employee must submit a CARROLL ISD TRAVEL REQUEST form, approved by the immediate supervisor, to the Financial Services Department, a minimum of ten (10) days before the funds are needed.
2. Not later than five (5) days after the trip, the employee must attach all bills and receipts to the approved CARROLL ISD TRAVEL REQUEST form, along with additional reimbursements that may be requested, to the immediate

supervisor. Failure to provide paid receipts may require the employee to reimburse the cash advance to the district.

The immediate supervisor will review the travel report, authorize or deny additional reimbursements requested and forward the report to the Financial Services Department for final processing. Incomplete forms and/or supporting documents will be returned to the traveler for completion, prior to final payout.

**IN-DISTRICT CAR  
ALLOWANCES**

The Board of Trustees will designate the employees who are to receive monthly in-district car allowances. Staff members who receive an in-district car allowance will only be paid for out-district travel expenses for the use of the personal vehicle beyond one hundred (100) roundtrip miles.

**TRAVEL OUTSIDE  
THE STATE OF TEXAS**

All requests to travel outside the State of Texas shall be approved in advance by the Superintendent of Schools or designee.

**USE OF STUDENT  
ACTIVITY FUNDS**

If student activity funds are used for employee travel, the guidelines of the appropriate club or student group will apply. In absences of a travel policy for the club or group, provisions of this policy will be followed.

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