

EMPLOYEE TRAVEL POLICIES

I. GENERAL

The following travel policies shall apply to all individuals traveling on behalf of the Midlothian Independent School District. Purchase Orders encumbering funds for **all** travel (conference fees, meals, mileage, and hotel) must be submitted prior to travel. Travel advances will not be given.

For individuals traveling using a federal/state grant or any other fund that limits the reimbursement amount, the allowable amount of the grant or fund will supersede any amounts contained in this procedure.

Any exceptions to travel procedures will require a written explanation and the Superintendent's or his/hers designee's approval.

See below for step-by-step instructions:

II. TRAVEL USING FEDERAL/STATE GRANTS

When employees travel using federal/state grants, the following guidelines **must** be used. There are **no exceptions** as these guidelines are set by state and federal agencies. Employees must also substantiate the travel meets the following criteria as it relates to the grant: Reasonable, Necessary, Allowable, and Allocable

- **Hotel** – the only rate allowed is shown on the GSA rate guide provided each October by the business office or found at www.gsa.gov This rate is determined by the city or county that the hotel is located in. MISD is state sales tax exempt, and city taxes will need to be added.

Note: If the hotel rate exceeds the allowable rate, the difference must be paid from the campus/department 199 budget account.

- **Meals - itemized detailed receipts must be provided.** The actual meal cost will be reimbursed up to the per diem amount per meal.
- **Breakfast - \$10.00**
- **Lunch - \$15.00**
- **Dinner - \$20.00**

Note: Breakfast is not reimbursable if a free breakfast is available at the hotel.

- **Mileage** - use Google Maps as the official mileage guide. Please calculate mileage from the MISD address to the destination address. If the address you leave from is somewhere other than a MISD address, MISD will reimburse the shortest mileage. Mileage will be reimbursed at the current mileage rate determined by the district. The rate can be found on the Travel Reimbursement form.

III. TRAVEL PURCHASE ORDER GUIDELINES FOR GENERAL OR FEDERAL FUNDED TRAVEL

1. Prepare purchase order for conference or workshop.
2. Prepare purchase order for lodging.
 - A. Reservations for lodging **must be made directly with the hotel** and not online or with any .com service (Expedia, Orbitz, Travelocity, Hotel.com, etc.).
 - B. Rates for rooms per person must not exceed the amounts shown on the GSA rate guide provided by the Business Office or found at www.gsa.gov. These rates are determined by the city or county that the hotel is located in. MISD is state sales tax exempt, but city taxes will need to be added.

Possible options to consider if the rate is higher are:

- Share a room with an employee of the same gender traveling to the same conference
 - Personally pay the difference
 - Find an alternate hotel within the price guidelines
- C. Conference hotel rooms should be booked as soon as blocks become available at the predetermined hotel/rate. These rates will be reviewed for reasonableness by the Business Office. Anything deemed exorbitant will require approval by the Superintendent or his/her designee.
3. Prepare purchase order for the employee for travel expenses **prior to travel date(s)** – meals/mileage/parking.
 - A. **Meals** will be reimbursed for travel involving overnight stay at the per diem rate of \$45.00 a day.
 - **Breakfast** - \$10.00
 - **Lunch** - \$15.00
 - **Dinner** - \$20.00

Breakfast is not reimbursable if a free breakfast is available at the hotel.

Note: Employees traveling with students will receive the student rate for meals. (See student travel on page D-6 for rates)

IV. MEAL REIMBURSEMENT SCHEDULE FOR OVERNIGHT TRAVEL

Meals will be reimbursed for the day of **departure** from MISD as follows:

- All meals for the day if you leave prior to 8:00 a.m.
- Lunch and Dinner if you leave between 8:00 a.m. and 2:00 p.m.
- Dinner only if you leave after 2:00 p.m.

Meals will be reimbursed for the **return** to MISD as follows:

- Breakfast if you return prior to noon
- Breakfast and Lunch if you return between noon and 7:00 p.m.

- All meals for the day if you return after 7:00 p.m.

Depart	Return	Meals
Before 8:00 a.m.	Before noon	B
Before 8:00 a.m.	Between 2:00 p.m. and 7:00 p.m.	B,L
Before 8:00 a.m.	After 7:00 p.m.	B,L,D
Between 8:00 a.m. and noon	Before 7:00 p.m.	L
Between 8:00 a.m. and noon	After 7:00 p.m.	L,D
Between noon and 2:00 p.m.	After 7:00 p.m.	D

*These are general guidelines for Overnight Travel for Meal Reimbursement

1. **Mileage** – use Google Maps as the official mileage guide. Please calculate mileage from the MISD address to the destination address. If the address you leave from is somewhere other than a MISD address, MISD will reimburse the shortest mileage. Mileage will be reimbursed at the current mileage rate determined by the district. The rate can be found on the Travel Reimbursement form.
2. **Parking, Public Fares, etc.** – if parking is paid to the hotel, the parking fees can be included on the hotel check. Otherwise, the original itemized receipt must be provided for reimbursement. These expenses can be estimated on the purchase order if the exact amount is unknown. Reminder: MISD is state sales tax exempt.
3. A Travel Reimbursement Form is required for all travel reimbursements. **Please use the travel form provided by the Business Office.** This is the only way to certify travel and to be reimbursed. The Travel Reimbursement form should be filled out in its entirety and should include the following information:
 - A. Name of person requesting reimbursement
 - B. Date and time of departure (leaving MISD) and return (arrival back to MISD)
 - C. Destination
 - D. Purpose of Travel
 - E. Account to be charged
 - F. Signature of employee and the Administrator (this should be dated after the employee returns from travel)
4. The completed Travel Reimbursement for and approved Purchase Order shall be submitted to the Business Office within 10 (ten) business days of the return date.
5. The Administrator's signature on the Travel Reimbursement signifies approval of the trip.

V. GROUP TRAVEL

Employees traveling in a group must generate individual Purchase Orders and submit individual travel forms. If employees are sharing certain expenses and only one original receipt is obtained, the person held accountable will be the individual requesting the reimbursement. List the name, position/title and corresponding account number of all individuals who are sharing expenses.

Employees traveling to the same location on the same day should make plans to carpool or request a vehicle through the MISD Transportation Department. The driver shall submit a copy of the Google Maps mileage calculation with their reimbursement and include the name of all riders in the vehicle on their travel form. The Google Maps mileage calculation must show mileage from address to address.

VI. DAY TRIPS

Day trips are defined as those trips where an overnight stay is not required. Therefore, an out-of-town trip would be classified as a day trip if the employee is not required to remain out-of-town overnight.

1. Travel advances will be approved for day trips **only when student** travel is involved.
2. Meals will not be reimbursed if the travel is within the DFW Metroplex (described as the counties of Collin, Dallas, Denton, Ellis, Henderson, Hood, Hunt, Johnson, Kaufman, McLennan, Parker, Rockwall and Tarrant). Exceptions will require the Superintendent's written approval.
3. Employees traveling for school-related business that is non-overnight and without students that require travel outside the business day (8 hours) that is outside the DFW Metroplex will be reimbursed one meal at the lunch rate of \$15.00. Documentation of the time leaving and returning home as well as the distance to the event must be provided and stated on the purchase order prior to the travel.

VII. OVERNIGHT TRIPS

Overnight trips are defined as those trips where an overnight stay is required. If an employee is involved in a multi-day trip within the DFW Metroplex (described as the counties of Collin, Dallas, Denton, Ellis, Henderson, Hood, Hunt, Johnson, Kaufman, McLennan, Parker, Rockwall and Tarrant) they will not be eligible for overnight or meal reimbursements without written approval of the Superintendent prior to the trip. If granted, the written authorization must be attached to the Travel Form.

VIII. OUT OF STATE TRAVEL

Out of state travel must be approved by the department head or principal prior to making any travel plans. Meal per diem rates remain the same for out of state travel.

- Lodging – MISD pays for all taxes; tax-exempt status does not apply out of state.
- Baggage Fees – MISD will reimburse employee for one checked bag.

IX. PUBLIC TRANSPORTATION

Any public transportation (commercial airlines, commercial buses, taxis, subways, etc.) which

are a necessity of the trip will be reimbursed with proper documentation and receipts as long as the employee selects the most economical service available and submits reimbursement request within reasonable time constraints.

X. IN-DISTRICT MILEAGE

A Purchase Order should be generated for the estimated amount of travel. This purchase order can be done for the entire period of travel and left open until the travel is completed. The employee shall keep track of their mileage using the In-District Travel form provided by the Business Office. Please see the In District Mileage Chart on page D-14. This chart is provided to help employees determine the mileage between MISD facilities. In-District Mileage reimbursement should be turned in monthly.

Use Google Maps to calculate mileage for destinations that are not listed on the chart. A copy of the Google Map mileage calculation should be attached to the travel form.

XI. ALLOWABLE EXPENDITURES

The following expenditures will be considered for reimbursement by MISD:

1. Self-Parking Fees
2. Hotel
3. Mileage – Google Maps is the official guide used to calculate mileage to and from the destination
4. Fuel – when driving a MISD vehicle or rental – you must submit an itemized cash register receipt, which details gallons purchased, fuel cost, date, etc.
5. Meals for overnight stays only, on a per diem basis
6. Registration Fees

XII. UNALLOWABLE EXPENDITURES

The following expenditures will not be considered for reimbursement by MISD:

1. Alcoholic beverages
2. Entertainment expenses
3. In-room movies
4. Meal expenses for day trips
5. Room service
6. Telephone calls, local or long distance, unless properly explained
7. Valet Parking (unless valet parking is the only option)