

PROCEDURES FOR OUT-OF-DISTRICT AND OUT-OF-STATE TRAVEL

Completion of the ***Travel Authorization Form- Staff Only*** or the ***Travel Authorization Form-with Students*** form is required when the event/activity is outside Cleveland, Oklahoma, Canadian, Grady, McClain, Pottawatomie, Logan or Payne counties, **OR** the state of Oklahoma. Notification and approval of immediate supervisor is required for any activity or event that takes you away from your daily duties. Please be aware that travel requests **MUST** be submitted 30 days prior to traveling for in-state travel and 60 days for out-of-state travel per board policy. All budget information must be filled in completely. Once the form is approved, no payment will be made from any funds not listed on the approved original form. Hotel and flight reservations **WILL NOT BE SECURED** until your request has been approved. Purchase orders **MUST** be in place prior to date of travel.

Procedures for Elementary and Secondary Sites

1. The traveler completes and prints the ***Travel Authorization Form- Staff Only*** or the ***Travel Authorization Form-with Students*** form and gives the completed form to his/her financial secretary for review. Due to changing economic pricing, it is good practice to estimate high when figuring travel costs. Travel submissions must be reviewed and submitted by each site's financial secretary. Any forms submitted to ASC for final approval by the traveler and not the financial secretary will be sent back.

*Any request to attend an out-of-district or out-of-state workshop or event, for either yourself or with students, **REQUIRES** a brochure or itinerary concerning the event or workshop. The itinerary must show the title of the event, dates and times, and location that the event is being held. Failure to send the itinerary with your trip request will delay the request from appearing on a board agenda for the approval of the Board of Education.
2. The financial secretary at the school site reviews form(s), obtains principal signature and forwards form(s) to ASC Administrator (i.e. Secretary of Asst Supt –Elementary Education, Secretary of Asst Supt – Secondary Education or Secretary to Director of Athletics).
3. ASC Secretary gets approval from Superintendents and the purchasing agent and puts the item on the board agenda, if applicable. After board approval the forms are forwarded to PA who will make lodging reservations.
4. PA will confirm with traveler any airline or lodging reservations and forwards form to financial secretary along with district credit card information. *
5. The financial secretary will prepare requisition(s) for travel. Brochures/itinerary for event/workshops must be scanned into ALIO and attached to all requisitions to be processed into purchase orders (out of state AND out of district).

6. OCAS Specialist will verify information and approve general fund requisitions to PA for a purchase order.
7. When travel has been completed, financial secretary processes purchase order(s) and forwards the purchase order(s) and receipts to Accounts Payable.
8. School activity purchase orders completed for payment are forwarded to the School Activity office.

* Employees will no longer use personal credit cards for airfare and lodging.

Things to Remember

*In-State Travel - All approvals must be obtained at least 30 days prior to travel date.

*Out-of-State Travel - All approvals must be obtained at least 60 days prior to travel date.

*All Out-of-District and/or Out-of-State travel requires an itinerary/brochure detailing the trip, and must include the title of the event, dates and times, and the location that the event/workshop is being held.

*Incidentals and Per Diem will NOT be paid to students.

*When estimating how much a trip will cost, it's always a good rule to estimate high, due to changing economic pricing.

*No payment will be made for unauthorized expenses. Any expenses not requested on the approved form will be disallowed.

*Application will not be considered if incomplete.