

Travel Reimbursement Guidelines

Please adhere to the following guidelines when requesting reimbursement for travel through the Grant Department. A copy of your approved *Permission to Travel* needs to be attached to each request.

- I. Reimbursable costs written in the grant include the following:
 - Registration
 - Meals (receipts for meals are not required)
 - Mileage
 - Hotel
 - Airline tickets
 - Parking/shuttle/baggage fees
- II. Travel Advances
 - Only out-of-pocket expenses which are required prior to attending the conference, such as airline tickets and registration fees, can be advanced more than two weeks before traveling. This would be turned in on a separate Travel Advance form separate from any advance of hotel fees or meals.
 - If registration was paid directly to the conference, do not list it on your travel advance or Employee Travel Expense voucher.
 - Other expenses, such as hotels and meals, can be advanced two weeks before trip.
 - The amount of all travel advances must be subtracted from the total reimbursement requested after traveling.
 - Write your mailing address on the Travel Advance form request to verify where the check should be mailed
- III. If you are traveling out of state and plan to drive, you must send written request to the Director of Internal Auditing getting approval along with the amount you will receive instead of flying. You must get written permission for rental cars as well prior to your travels. The request form can be printed from the Grant Dept website.
- IV. If your stay necessitates the rental of a car, written permission must be obtained from the Superintendent before you leave. Additionally you must purchase insurance from the rental company.
- V. Save all receipts except for meals. Attach receipts with appropriate form.
- VI. When sharing a hotel room, one person pays for the room; do not split the cost of the room. The name of the person paying for the room must appear on the bill.
- VII. Make certain conference rates are being used for hotel charges. Parish policy will not reimburse amounts exceeding conference rates. You will be responsible for the difference. When checking in, verify that you are getting the conference rate.
- VIII. Complete the Travel Reimbursement Checklist and return your travel expense voucher, along with all other documents required for reimbursement, to the Grant Department immediately upon returning from your trip.

**Frequently Asked Questions (FAQs)
For Employee Expense and Travel Vouchers**

What information should be included on a professional trip form to be able to claim reimbursement for expenses? ***Employee name, date of trip, destination, approximate cost of trip and approval signatures.***

Can I/how do I print the expense voucher form on letter sized paper? I don't have legal paper available. ***The only acceptable paper for the employee expense and travel voucher is legal.***

Who approves the employee expense and travel voucher? Where do I send it? ***Your immediate supervisor and the department head for the budget code used. The reimbursement form should be sent to your supervisor and it should be routed to the Accounts Payable department.***

How do I complete the form? Do I write each thing (lodging, mileage, meals) on a separate line or everything on one line? ***Each expense for each trip can be written on one line. Follow through on the reimbursement form.***

Will my reimbursement be on my payroll check? How will I be paid? ***Your reimbursement check will be sent to you from the Accounts Payable department on an Accounts Payable check and will not be associated with your payroll check.***

What documentation do I need to be reimbursed for travel expenses ie. Lodging, meals, mileage, other? ***Receipts required for lodging, public or private transportation totaling more than \$9.99, and airfare. All receipts should include the employee's name and method of payment. If a credit card was used, the last four numbers on the account has to be visible. Other expenses will be reimbursed at the allowable rates in C.P.S.B. policies. Each employee is responsible for his/her expenses and should not pay for anyone else or allow anyone else to pay his/her expenses. Please refer to the travel policy for a detailed explanation. Other documentation includes the following: approved permission to travel, an agenda and conference hotel information with room rates.***

What other expenses, if any, can I be reimbursed for besides what is apparent on the form (mileage, lodging, meals), such as baggage fees, parking, tips...? ***Any approved expense incurred while traveling is reimbursable with the proper documentation attached to the employee expense and travel voucher.***

How long does it usually take to receive reimbursement? **Once an approved request with all of the proper documentation is received, reimbursement should take no longer than two weeks. When submitting a reimbursement request, please use the employee's legal name. (Same name that is on file in personnel department.)**

How do I get registered for the conference? Do I have to pay for my registration fee myself? **The department submits a requisition for the amount made payable to the conference sponsoring entity and Accounts Payable will pay the registration fee.**

Do I have to sign all of the receipts? (Hotel, parking, etc.?) **Your signature is not required on the receipts, but every receipt has to be in your name.**

Hotel Rooms

Can I pay for 5 hotel rooms for my teachers? **No, each employee is responsible for his/her expenses.**

My roommate and I want to split the cost of two nights hotel and each pay for one night. How do we do that so that we can be reimbursed properly? **A receipt in your name has to be included with total amount paid and method of payment. This practice is not recommended but if used, each employee has to complete individual paperwork.**

Do I have to write the name of my roommate on the form if I was not the person who paid for the hotel? **Any and all information is helpful and will help speed up the process for reimbursement.**

I forgot to bring my hotel tax exemption form (or didn't know that I was supposed to bring it) and I was charged tax on my hotel. Can I be reimbursed for the total expense or do I have to subtract the tax from my reimbursement? **If proper documentation is attached evidencing that you paid the tax, you will be reimbursed for the tax.**

I was charged tax on my parking. Do I have to subtract that from my reimbursement or can I be reimbursed for the total? **If proper documentation is attached evidencing that you paid the tax, you will be reimbursed for the tax.**

What do I do if the conference hotel's block of rooms are sold out? **Documentation from the conference and hotel stating that the block of rooms was sold out has to be attached so that another hotel can be eligible for reimbursement.**

What do I do if the hotel did not charge the conference rate?

The error should be corrected before check-out. If not, the employee has to contact the hotel and have the error corrected. The conference rate will be the maximum amount reimbursed for a stay at the conference hotel.

Meals

How do I know if where I am traveling is high cost or low cost for claiming my meals? (For areas that are not Baton Rouge or New Orleans.) ***On the C.P.S. B. website: Employee > Internal Auditing > Forms > Travel forms-High Cost Area***

How early do I leave to get reimbursed for breakfast & how late do I get home to get reimbursed for supper? How do I know what meals are eligible for reimbursement? ***The policy states that if travel begins before 6 am, breakfast is allowed. If travel extends beyond 6 pm, dinner is allowed.***

Travel Advance

How do I request an advance? How much can be advanced? What is the process? ***The approved Request for Travel Advance form should be submitted to the Accounts Payable department with approved permission to travel form attached no later than two weeks prior to trip. Airfare and lodging will be advanced.***

When do I turn in the paperwork for an advance? When will I get the check? ***The approved Request for Travel Advance with the correct documentation attached Request for Travel Advance form should be submitted to accounts payable no later than two weeks prior to the trip. If airfare is purchased well in advance of a trip, that request can be submitted as soon as airfare is purchased. The request for lodging can be submitted two weeks prior to the trip.***

I was advanced for my hotel but need to be reimbursed for my mileage now that the travel is ended. Do I need to list the hotel on the reimbursement or just the mileage? (They don't know to list all the expenses and then to subtract the advance from the final total to show the advance and the total expenses for the related trip.) ***Once the trip is completed, the travel expense voucher should be submitted with all of the expenses and pertinent information attached. The amount of the advance will be subtracted and any overage should be reimbursed to the CPSB. If any amount is owed to the employee, a reimbursement check will be processed.***

I received an advance but cannot attend the conference. What do I do with the advance? ***If the check has not been cashed, it should be returned to the Accounts Payable department. If the check has been cashed, the employee is responsible for returning those monies to the Accounts Payable department i.e. check, cash, money order or cashier check.***

Flights & Rental Cars

If I book my flight two months before the trip and need a travel advance for both the flight and hotel, can I complete one travel advance form for both and get my flight reimbursement right away? ***You can be advanced immediately for the cost of the flight. A separate request for lodging will have to be submitted no later than two weeks prior to the trip.***

What do I do if I need a rental car to get from the airport to the hotel and back? Do I keep it the whole time? ***If a rental car is needed, a formal letter of request must be submitted to the Office of the Superintendent. If approved, the letter with approval should be attached to any request for reimbursement.***

Can I purchase airline tickets for my coworkers to make sure we are all on the same flight? ***No, each employee is responsible for his/her own expenses. Under no circumstances is any employee to incur expenses for anyone else. This practice is strictly prohibited.***

Mileage

If I need to drive separately from the other teachers, can I get reimbursed mileage? ***All efforts must be made to carpool when multiple employees are attending the same function. If absolutely not possible, approval to drive independently must be obtained from the Office of the Internal Auditor.***

What procedure do I follow if I decide to drive out of state instead of flying? ***A formal request will have to be submitted to the Internal Auditing department in writing. Travel policies clearly indicate how reimbursement will be calculated in this circumstance.***

How is mileage figured – from school to conference & back? How do I know how many miles to claim? ***The policy states that the most direct and usually traveled route should be taken. Any mileage request must begin at the employee's official workplace domicile (not a home residence). Reimbursement is made according to the current IRS rate.***

Can I get reimbursed mileage if I drove, but roomed with someone that paid the parking fees? Does my roommate have to receive the mileage reimbursement and pay me back? ***Mileage should only be reimbursed to the person who drove.***

Please refer to the policy manual for a more detailed explanation of the travel policy.