Hazelwood School District
Travel Approval Request

Name	
Email	
Address	
City	
State	
Zip Code	
Employee (Clock in) #	
School/Department	
Account Key (GL)	
Trip Destination	
Purpose	
Dates of Travel	
Dates of Lodging	
Will a rental car be needed?	**Yes** ☐ **No** ☐
If yes, explain justification	
Are you requesting an expense advance?	**Yes** ☐ **No** ☐
If yes, amount requested	

My signature verifies that I have read, understand, and agree to comply with the Hazelwood School District Travel Procedures. By endorsing and cashing a travel advance check, I agree to authorize the Hazelwood School District to deduct the amount of this advance from my paycheck if I fail to adhere to these procedures.

(Signature) _____

I have attached the following required documents:

- o Conference/Workshop Agenda/Registration Cost Information
- o Itemized Expense Proposal
- o Signed and Approved Professional Development Request form (when applicable)

Hazelwood School District
Travel Procedures

These procedures apply to all overnight travel, regardless of the funding source.

All travel must be approved **in advance** by the building principal/program director (or supervising assistant superintendent if it is travel for an administrator). Travel for all others must be approved **in advance** by the immediate supervisor. If the travel is being funded by building PDC funds, the travel must also be approved **in advance** by the Building PD Committee (BPDC)/District PD Committee (DPDC) and documented on the "Professional Development Request" form. The "Travel Approval Request" form should be used to document this pre-approval. The Travel Approval Request form can also be used to request a cash advance for expenses. Individuals who have a district Visa purchasing card should not request (and will not be given) an expense advance; however, they will need to submit a Travel Approval Request form for pre-approval. If traveling with a district Visa, be certain that you have sufficient funds loaded onto your card prior to your departure. Any travel expenditures charged to Visa without prior approval will need to be reimbursed to the District. The business office will follow district procedures when reimbursing travel expenses. Travel expense reports are due in the business office within ten (10) business days after the completion of the travel. If this deadline is not met, the payroll department has the right to deduct the amount of the expense advance from the employee's paycheck. All claims for reimbursement must be accompanied by **itemized receipts**.

Hazelwood School District is exempt from sales tax from the State of Missouri. Be certain to obtain a copy of our sales tax exemption letter prior to traveling in the state of Missouri. If paying with a district visa, the district's Missouri tax ID is printed on the top of the purchasing card. It is your responsibility to be certain that no Missouri sales tax is charged on any transaction and any Missouri sales tax included on your itemized receipts will **NOT** be reimbursed.

School District Board members and District staff who are approved to attend workshops, seminars, conventions, and meetings in the course of fulfilling the responsibilities connected with their positions shall be compensated for necessary expenses in accordance with the following provisions:

A. Approval

1. All staff requesting travel for district business must submit the Travel Approval Request form and receive approval in advance of travel. The Travel Approval Request form is attached to the end of this section. This form must be approved prior to registering for any conference.

2. Staff are required to attach the following items to the Travel Approval Request form:
    a. Conference/Workshop agenda with registration cost information
    b. Itemized Expense Proposal that includes:
        i. Dates of Travel
        ii. Dates of Conference
        iii. Estimated daily expenses (food and beverages excluding alcohol)
        iv. Estimated transportation expenses
        v. Estimated lodging expenses
        vi. Car rental information, when applicable

c. Copy of the signed and approved BPDC/DPDC Professional Development Request form, when applicable

3. Forms for final approval should be submitted to and will be granted by the:
    a. Assistant Superintendent for Curriculum & Elementary Education for all travel paid from building and district professional development budgets, educational conference budgets and/or curriculum budgets
    b. Director of Federal Programs for all travel paid from a federal awards except for Perkins
    c. Special Area Curriculum Coordinator for all travel paid from Perkins Grant
    d. Supervising Assistant/Associate Superintendent for all travel paid from a department budget

B. Lodging

1. Lodging expenses: Actual reasonable lodging costs paid at a single room rate.

2. If accompanied by traveling companion(s), lodging is reimbursed at the single room rate when a single/double rate structure is in effect.

3. Any expenses charged to room should be paid at the time of checkout. Allowable food charges will be included in your daily maximum reimbursable expenses.

C. Transportation To and From Destination

1. Airline service including airline baggage fees: The most reasonable coach class for all personnel.
2. Private car, when specifically approved in advance – current district approved mileage reimbursement rate and actual costs of ferry, road, bridge, tunnel tolls and reasonable and necessary parking fees, if a District request. If authorized for personal convenience, current district approved mileage reimbursement rate or appropriate airline fare, whichever is less, is allowed. Only the driver will be reimbursed in carpool situations.

3. Between residence and airline terminal: taxi, hotel shuttle or private car may be used. Reimbursement for use of a private car will be at the current district approved mileage reimbursement rate for actual round-trip mileage. Reasonable parking fees will also be paid.

4. Between airline terminal and hotel: taxi fare, hotel shuttle or car rental (if authorized) is allowable. Car rental will only be reimbursed if approved in advance. If an employee is authorized at District request to utilize a private auto for this purpose, the current district approved mileage reimbursement rate will be allowed.

D. Local Transportation

1. Travel between hotel and conference: Taxi fare will only be reimbursed if there is not a hotel shuttle or a taxicab is more cost effective than a hotel shuttle.

2. Travel between hotel and eating establishments: Taxi fare will only be reimbursed if no eating establishment is located within one mile, the hotel does not contain an eating establishment, **and** there is not a hotel shuttle.

3. Parking: Parking will be reimbursed if use of personal vehicle or rental vehicle has been approved in advance of travel.

E. Registration Fee

1. Registration fees required for attendance are paid.

F. Conference Materials

1. Personnel shall be reimbursed for the cost of conference materials which are not included in the conference registration fee, if prior approval has been received.

G. Other Expenses

1. The maximum daily reimbursement for meals and other incidental expenses is $60 per day. These expenses are limited to:

    a. Meals will not be reimbursed if already included in the conference fee
    b. Gratuities and tips – to be reimbursed, all gratuities and tips must be listed on an itemized receipt

H. Any additional expenses not covered above shall be paid by the individual. Personal items will not be reimbursed.

I. Expenses for traveling companion(s) accompanying the employee are the responsibility of the employee and not subject to any School District reimbursement.

J. Records and Receipts

1. Advances
    a. Advances on daily travel expenses may be requested by submitting a Travel Approval Request form and marking the appropriate choice.

2. Travel Expense Report
    a. A Travel Expense Report accompanied by appropriate itemized receipts and itemized expenses must be returned no later than ten (10) business days after the attendee returns. **Failure to do so will result in the funds advanced being withheld from the employee's paycheck**. The Travel Expense Report form is available from your dashboard in IFAS or on the finance page of the district's website. User name for non-IFAS users is *HSDteach* and the password is *travel*.

    b. Any advance in excess of the approved expenses must be returned to the District at this time. **Should an employee not return the funds, the District will withhold the amount owed from the check on next available pay period.**

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Travel Procedures

3. Receipts
    a. Lodging – Itemized hotel receipts must be submitted. Hotel receipts should be adjusted at check-out by payment for the difference between a single/double rooms when appropriate. Any expenses charged should be paid at the time of check-out.
    b. All expense items must be substantiated by an itemized receipt.

Hazelwood School District
Travel Procedures

Guidelines for Renting Cars for Travel

- Car rentals are discouraged.

- **Rental cars will be considered for the following situations only**:
  1. There are no shuttles from the airport to the conference destination.
  2. The hotel is not within walking distance of the conference and no shuttles are provided.
  3. Depending on the number of employees traveling together, the cost of shuttles/cabs would be higher than the total cost of a rental car, insurance, parking and fuel.
  4. Emergency situations

- Requests for rental cars must include at least three (3) company comparisons with the best rate selected. The rental car must be reserved in the name of Hazelwood School District in order for the District's insurance to apply. It can be paid from a District Visa card or a P-card.

- If the District is responsible for the insurance, a certificate of insurance must be requested from Arthur J Gallagher **in advance** to have while driving the rental car and a copy given to the rental company at the time of check-in. A $500 deductible applies. Call Kuleya Bruce @35016 or Mary Daniel @35049 to order the certificate of insurance.

- Insurance: The District insurance carries a $500 deductible if damage occurs, for which the school/program will be responsible. Therefore, it is recommended you accept the insurance from the rental company if the rates are reasonable. Otherwise, follow the steps in the previous bullet.