



# METROPOLITAN SCHOOL DISTRICT OF PIKE TOWNSHIP

*Administrative Service Center*

6901 Zionsville Road, Indianapolis, Indiana 46268-2467

www.pike.k12.in.us

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*Monet Gray  
Interim Chief Financial Officer*

**To: All Employees**

**Date: August 10, 2025**

**Re: Employee Reimbursements**

All employee reimbursements (travel, mileage, and reimbursement for district purchases) are processed through payroll direct deposit.

**A few things to keep in mind regarding reimbursements:**

- Employee reimbursements will show on your check stub as "OTHER, EMPLOYEE REIMBURSEMENT" next to the reimbursement amount.
- Employee reimbursements are excluded from payroll taxes.
- Employee reimbursements are excluded from Perf and TRF wages.
- Employee reimbursements will only occur with each regular payday, so please submit your reimbursement paperwork timely.
- Reimbursement paperwork submitted to Mrs. Kim Werner in the Business Office at least nine (9) calendar days prior to the scheduled pay date will be included on that pay date.
- Reimbursement paperwork submitted later than the nine (9) day lead time will be included on the next available pay date.

**A few reminders regarding employee reimbursements and documentation:**

- Items for reimbursement must be delivered to an MSD of Pike building. Deliveries to a personal address are NOT permitted.
- Please attach "ORIGINAL" receipts to a fully completed Accounts Payable (AP) Voucher.
- All AP Vouchers must be clear and legible.
- The State Board of Accounts requires "ORIGINAL" receipts (no copies).
- The MSD of Pike Township is Tax Exempt; therefore, sales tax will not be reimbursed.
- Reimbursement paperwork with errors/omissions will be returned to the employee for corrections. This may delay the employee's reimbursement.
- All mileage claims must be submitted MONTHLY. Failure to do so may result in the mileage reimbursement being denied.
- All employee reimbursement paperwork must be submitted in a timely manner. Reimbursement paperwork received 60 days after the event may be denied.
- Please refer to the Travel and Mileage Reimbursement Procedures for additional information.

# Travel and mileage Reimbursement Procedures

## Section 1 Procedure and Application

This procedure sets forth the procedures for traveling and for claiming reimbursement for travel expenses incurred by any person who has traveled on School District business. This procedure is applicable to all Schools and Departments.

### Section 1-1 Spirit of this Procedure

All travelers seeking reimbursement should incur the lowest reasonable travel expense (example-sharing a room or riding together) and should exercise care to avoid impropriety or the appearance of impropriety, including the public perception that a business trip has been taken for personal reasons. Public Funds may never be used for personal gain.

### Section 1-2 Definitions

Claim or Claim Form- Accounts Payable Voucher

Mileage Reimbursement- This would be travel that requires the use of your personal vehicle. Mileage reimbursement should be submitted on a Mileage Claim Form.

Inside Mileage- Mileage incurred in traveling inside the School District.

Outside Mileage- Mileage incurred in traveling outside the School District.

Mileage Rate- The current approved IRS mileage rate will be paid for all mileage claims.

Request to Attend – Professional Meeting Request Form

Travel Expense Log- Log used to document expenses when out-of-town travel is two or more days

Travel Reimbursement- Travel that requires an overnight stay, mileage or meal expense reimbursement. Generally, meal expenses will not be reimbursed unless travel is over 50 miles one way from Indianapolis or an overnight stay is approved. A Travel Expense Log must be completed when traveling out-of-town for two or more days.

## Section 2 Authorized Travel Generally

Travel that requires an overnight stay, mileage or meal reimbursement must be approved **in advance** and in writing by Principal, Director or Supervising Administrator<sup>1</sup>. This is documented by completing a Request to Attend Form.

### Section 2-1 Criteria for Approval of Travel

- (A) Travel Reimbursement is designed to reimburse the expenses of a person on School Business and allowing up to one-day travel time before and up to one-day travel time after the meeting, depending upon actual circumstances.
- (B) In keeping with the “Spirit of the Procedure”, travel status should not start prior to or end after the normally required periods of time necessary to complete the School Business.
- (C) The primary purpose for travel must be School Business, but occasionally a person may be approved to take a trip that includes both personal time and business travel. The “Request to Attend” form must indicate the complete period of time the person will be on travel status, including personal time. However, no travel will be approved if it encompasses personal time both before and after the official School Business. A combination trip benefits the

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<sup>1</sup> Teachers and principals need approval from the Director of Instruction/Staff Development. Directors need approval from the Superintendent.

traveler to some extent. A traveler shall exercise special care not to seek reimbursement for expenses that could be construed to be personal. If vacation or time off is combined with any trip, the lodging and subsistence for the extra days of travel are not eligible for reimbursement.

- (D) Persons traveling to locations within a four-hour drive time are generally expected to travel by automobile (example from Indianapolis to Chicago). However, individual circumstances and time commitments before and /or after travel may necessitate airline use. Airline use in these circumstances must be approved beforehand. If automobile travel is utilized for longer trips, reimbursement will be limited to the allowable IRS mileage rate not to exceed the cost of a round trip coach airline ticket.
- (E) Normally “side-trips” are not approved in conjunction with School Travel. However, special calculations are required when travel includes “side-trips” not required by School Business. If School Business requires the traveler to travel from city “A” to city “B” and the traveler actually goes to city “C” either before or after going to city “B”, the allowable reimbursement would be the prorated commercial carrier fare actually paid between city “A” and City “B” times two, or the map mileage times two if driving a personal vehicle.

### Section 3 Reimbursement for School Travel

The School System shall only make payment to or on behalf of a School Traveler under the following terms and conditions:

- (A) Payment of the School Travel expense must be approved **in advance** by the employees’ Principal, Director or Supervising Administrator on a Request to Attend form which includes the account number(s) for the expenses. Reimbursement allowed only for items and amounts approved on Request to Attend.
- (B) After travel has been completed, School Traveler submits a claim with **detailed original receipt** for reimbursable expenses for the School Travel expense. A Travel Expense Log must also be completed and submitted when traveling out-of-town for two or more days. The accounts payable voucher must be signed by employee and employee’s Principal, Director or Supervising Administrator and then submitted to the Business Department along with copy of approved Request to Attend. All expenses for a specific School Travel should be submitted on one accounts payable voucher. **A School Traveler cannot be reimbursed for another persons’ expenses.**
- (C) Paying the expense does not violate any law, statute, court order, State Board of Accounts guideline, or regulation of the School Board.
- (D) The travel expense was incurred in compliance with this procedure.
- (E) A School traveler may be reimbursed for the cost of registration fees associated with attendance at conferences with original itemized receipt. **A School Traveler cannot be reimbursed for payment of individual membership fees or late fees.**
- (F) Odometer readings are required on the completed Mileage Claim Form.
- (G) Reimbursement is allowed only after travel dates.

### Section 3-1 School Travel Expense Limitations

- (A) The Business Dept. will not pay a traveler when another person or entity, other than the School Traveler, pays the expense. **A School Traveler cannot be reimbursed for another person’s travel expenses.**

- (B) If a School Travel Expense has been approved in advance by the appropriate Principal, Director or Supervising Administrator, the actual expense must be less than or equal to the approved School Travel expense as approved on Request to Attend.
- (C) Maximum meal expense is \$50 per day. Gratuity on meals is reimbursable up to 15% and included within the \$50 per day.

#### Section 3-2 Allowable Reimbursements-Limitations

Each person requesting reimbursement for School Travel expenses shall submit a claim covering only the person's own expenses. No reimbursement may be made for the expenses of another person. However, a person may receive reimbursement for the School Travel expenses of pupils and parents/guardians. The request for reimbursement for these expenses must be separately itemized and justified in the request for reimbursement.

#### Section 3-3 Preferred Travel Expense Method

The School District shall make payment when travel is by the preferred traveling method. The preferred traveling method is the least expensive or most cost-effective means of travel which is also:

- (A) Available at the time and place where it is needed.
- (B) Necessary for the School Travel involved.
- (C) Appropriate, sufficient, and timely for the School Travel involved.
- (D) Reasonably safe; and
- (E) Reasonably comfortable.

#### Section 4 Transportation

All travelers seeking reimbursement should incur the lowest reasonable travel expense (example- riding together or using long-term parking versus valet) and should exercise care to avoid impropriety or the appearance of impropriety, including the public perception that a business trip has been taken for personal reasons.

#### Section 4-1 Mileage, Parking, Tolls and Public Transportation

- (A) A person in travel status may be reimbursed for the cost of parking and tolls. Should use the least expensive parking available. Valet parking may only be reimbursed if "self-parking" is not available (should get something in writing from parking company stating no self-parking available).
- (B) The cost of parking at a terminal may be reimbursed at long-term rates
- (C) The cost of taxi, uber (or similar), shuttle or other public transportation between an employees' home and a terminal may be reimbursed.
- (D) The cost of taxi, uber (or similar) or other public transportation between School Traveler hotel and conference location may be reimbursed.
- (E) The cost of taxi, uber (or similar) or other public transportation to travel for dinner may be reimbursed – distance/cost to location must be reasonable.
- (F) As approved on Request to Attend, the use of a school traveler's personal vehicle for approved school business may be reimbursed at the approved IRS mileage rate for Business miles traveled in conjunction with Board policy.
  - 1) A mileage claim for reimbursement must be completed and attached with the ap voucher that includes all expenses for each approved travel. The claim for

reimbursement must itemize the business use of the vehicle in the description and show odometers readings and point-to-point(to/from) travel.

- 2) It is the responsibility of the traveler to make sure the odometer readings are recorded.
- (G) Only expenses approved on Request to Attend may be reimbursed as noted in Section 3.

#### Section 4-2 Vehicle Rental

- (A) Vehicle rental expense is reimbursable for School Travelers when it is efficient and cost effective and when approved in advance on the Request to Attend. The least expensive practical vehicle should be rented. A school traveler cannot be reimbursed for any expenses associated with a vehicle rented in someone else's name.
- (B) Collision Damage Waiver (CDW), or Liability Damage Waiver (LDW), insurance covering use of the vehicle is a reimbursable expense. The cost of any other insurance will not be reimbursed and such costs must be deducted from the claim for reimbursement.
- (C) The initial payment of the cost of renting a vehicle is the responsibility of the School Traveler. As approved on Request to Attend a traveler may be reimbursed for:
  - (1) The cost of renting the vehicle;
  - (2) The cost of additional fuel;
  - (3) The cost of Collision, or Liability, Damage Waiver (CDW) or (LDW) insurance;
  - (4) Parking
  - (5) Tolls
- (D) Each item of cost must be supported by original receipts. The claim for reimbursement must itemize the business usage of the rental vehicle, showing point-to-point (to/from) travel, the same as for a personal vehicle.
- (E) It is the responsibility of the traveler to make sure the beginning and ending mileages are on the original rental car receipt.

#### Section 4-3 District Vehicles

- A. As approved on Request to Attend the School Traveler may be reimbursed for:
  - (1) The cost of additional fuel
  - (2) Parking
  - (3) Tolls
- B. Each item for reimbursement must be supported by original receipts. The claim for reimbursement must itemize the business usage of the vehicle, showing point-to-point (to/from) travel, the same as for a personal vehicle.

#### Section 5 Lodging

A person in travel status may claim reimbursement for actual lodging expenses not exceeding the single occupancy room charge, including taxes, for over-night stays only. It is the traveler's responsibility to check out of the accommodations in sufficient time to not be required to pay additional expenses for late check-out.

#### Section 5-1 Lodging Limitations

A person may not claim reimbursement for lodging when the lodging was provided by another person who is not in the business of providing lodging. Charges for telephone service for personal calls,

movies, books, purchased materials and alcoholic beverages cannot be claimed. If a meal is charged to lodging bill, the original itemized receipt for the meal must be provided to receive reimbursement. Please ask the hotel for a detailed receipt at checkout. Do not use the express checkout option if no receipt is furnished.

#### Section 6      Subsistence Allowance

A subsistence allowance may be reimbursed for any day during which a School Traveler is in approved travel status for the required length of time – original itemized receipts are required.

- (A) The rate for the all schools and departments has been set at \$50.00 per day. However, if the actual receipts are less than \$50.00, then the lesser amount will be reimbursed. Gratuity on meals is reimbursable up to 15% and included within the \$50 per day. Meal receipts must list itemized charges. The tip must be included on the vendor receipt or charge slip – submit both receipts for reimbursement (itemized receipt and charge receipt). Hand written tip amounts on receipts cannot be reimbursed. See examples next page.

## Examples

### Acceptable tip receipts

Thank you for dining with  
P.F. Chang's China Bistro.

#8400  
317974 5747

Server: Samantha 03/12/2018  
Table 27/3 7:54 PM  
Guests: 2

**#30069**

cnangs Chicken 15.95

SUBtotal 15.95  
Tax ... 1.44

Total 17.39

**Balance Due 17.39**

Thank you for dining with  
P.F.Chang's China Bistro.  
#8400  
317 974 5747

Server: Samantha DOB: 03/12/2018  
08:00 PM 03/12/2018  
Table 27/3 3/30069

SALE

Vlsa 3145802  
Card#XXXXXXXXXXXX6025  
Magneticcard present: ANTHONY/MICHAEL  
CardEntryMethod: S

Approval: 005111

f.  
Amount: \$17.39

+ Tip: 2.00  
= Total: 19.39

I agree to pay the above  
total amount according to the

card issuer agreement.

X. \_\_\_\_\_

\*\*\*\*\*  
P.F.Chang's Rewards Members:  
Don't forget to give your phone  
number to your server to earn  
points for today's meal.  
\*\*\*\*\*  
Gratuity Not Included

\*\*\*\*\*  
P.F. Chang's Rewards  
Members: Don't forget to give  
your phone number to your  
server to earn  
points for today's meal.  
\*\*\*\*\*  
Gratuity Not Included

### Unacceptable tip receipt

OINEIN  
CHECK NBR: 59  
CHECK AMT: \$ 16.03  
TABLE: 31  
FROM: WS2

Jan 17, 2018 -- 6:52pm  
Server: Bobby B.

1- BuffCk.Sand 10.99  
with lixed Veggie  
1-Soup, FIRSTOUT 3.99

Sub Total: 14.98  
Sales Tax 1: 1.05  
Total : 16.03

ENGINEER GREAT DAV!!  
RailsCraftBrew and Eatery

112 St.Louis  
Seymour, IN 47274  
812-271-1191

- (B) If all meals are provided, simply make no claim for subsistence. The School System must not pay for a person's meal more than once. If a person in travel status receives a meal without charge, then the subsistence allowance must be reduced as follows:
- (1) Breakfast or Lunch, then the daily rate is reduced by one-fourth.
  - (2) Dinner, then the daily rate is reduced by one-half.

#### Section 6-1 50 Mile Restriction

- (A) Generally, meal expenses will not be reimbursed unless travel is over 50 miles one way from Indianapolis or an overnight stay is approved.
- (B) Except as noted below, a person is not entitled to lodging or a subsistence allowance for over-night travel if travel takes the person fifty (50) miles or less from their work location or the person's home.
- (C) A Principal, Director or Supervising Administrator may authorize payment of lodging and subsistence allowance by making a determination that it may be dangerous or undesirable for a person to travel because of any one of the following:
- (1) Unsafe highway/weather conditions.
  - (2) Lack of public transportation and the person's dependence upon such transportation.
  - (3) The employee's physical condition, or
  - (4) Prior written approval from the Principal, Director or Supervising Administrator because of unusual work assignment.

#### Section 7 Record Keeping

Except as provided below, a person requesting reimbursement for the actual cost of any item or expenditure must include an **original paid receipt** with the claim for reimbursement along with a copy of the approved Request to Attend and Travel Log (if 2 or more days). Most credit card receipts will not qualify as a receipt by themselves, but they can be used as a "Proof of Payment" if a lodging bill does not indicate it has been paid. This includes, but is not limited to; lodging bills, passenger coupons, and taxi or cab receipts (including tip), all indicating "paid in full". Other items such as tips to airport porters are not reimbursable. Original receipts cannot be altered, and to prevent distortion may not be marked up with "High-Lighters".

If hotel or airlines tickets are purchased through the internet, it is sometimes difficult to obtain a paid receipt from the provider. In these cases we will require a complete copy of the internet confirmation and a copy of your credit card statement showing that the charges were made to your credit card. You may black out any other non relevant information on the credit card statement. Please ask the hotel for a detailed receipt at checkout. Do not use the express checkout option since no receipt is furnished.

- (A) The type of receipts may be hand written or preprinted, but must be legible and conform to the following standard:
- (1) Written receipts:
    - (a) Must be signed by the payee,
    - (b) Must indicate amount paid,
    - (c) Can not contain alterations to dollar amounts,
    - (d) Must indicate purpose for payment,
    - (e) Must give name of payer, and
    - (f) Must give date of payment.

(2) Preprinted receipts:

- (a) Must give name of payee,
- (b) Must indicate amount paid, and
- (c) Must indicate purpose of payment.

Section 7-1 Lost Receipts Procedure

If a receipt for any item of expense has been lost or is unobtainable, the following may be substituted:

- (A) Airfare: Documentation from the airline or travel agent.
- (B) Lodging: A statement from the provider or copy of lodging bill and paid receipt.
- (C) Other: A statement from the Principal, Director or Supervising Administrator.

Section 8 Other

Every effort should be made to promptly process all travel expenses. It is important that travel expenses be recorded in the time period that they occur. At no time should travel expenses be processed more than 60 days after the travel has occurred. Reimbursements must be submitted no later than 60 days from travel date to receive reimbursement.

Section 9 Instructions for completing Travel Expense Claim Form

See forms section for instructions and examples of completing form. Please review these instructions before completing your individual claim. Examples of acceptable and unacceptable expenses receipts have also been provided. All reimbursable expenses for each approved School Travel must be submitted on the same claim along with appropriate documentation and copy of approved Request to Attend. Each receipt amount must be listed separately on the travel log. The claim should list the to/from dates of the travel and the total amount to be reimbursement (if submitting a travel log).

# Travel Reimbursement Directions on Professional Meeting Request Form

## Submitting Form for Approval - make sure that the following is completed prior to submitting:

- ✓ Attach 3 copies of the registration form. If this is a new vendor - must have W-9 attached.
- ✓ Name, meeting place, your building abbreviation, and dates are filled out. Please include travel time if you are asking for reimbursement. If this is an ongoing training - list only dates that fall within the same month.
- ✓ Your signature and that of your supervisor are complete. (No stamped signatures will be accepted!)
- ✓ Account number for any reimbursement.
- ✓ Registration fees are Board approved and paid monthly. Therefore, registrations must be submitted prior to the Board Docket cut-off date which is usually 45 days prior to registration deadline. (please see school secretary for dates). If the Professional Meeting Request is submitted after the docket cut-off date, it will not be paid until the next month board meeting. If an employee misses the cut off and would like to attend, they may pay for the registration out of pocket and ask for reimbursement after attending the event. If an employee pays for the registration out of pocket, a validated receipt (dated with type of payment received and conference name, address, and phone number) needs to be submitted for reimbursement. The district will not pay late fees assessed on registrations.
- ✓ Be sure to ask for a receipt at the conference if you paid for your registration by phone or electronically.
- ✓ The following may not be included in your registration fees:
  - Membership fees
  - Special ticketed events (luncheons and dinners may be included but will become a part of the \$50 per day per diem)
  - Special purchase items (totes, lab coats, etc.)
  - Late fees

### After travel is completed:

- ✓ Complete and sign accounts payable voucher for reimbursable expenditures
- ✓ Attach copy of approved professional meeting request (can only reimburse up to approved amount) **Original** (not a photocopy) form may be revised and submitted for revision approval as needed. (see note on front of form)
- ✓ If traveled 2 or more days, complete and attach travel expense log. On accounts payable voucher include only total to be reimbursed (itemization is on travel log)
- ✓ Attach itemized receipts that include date and vendor name (only vendor provided itemized receipts accepted and receipt must have pre-printed vendor name)
- ✓ Voucher must have valid account number and employee ID number
- ✓ Accounts payable voucher must also be signed by principal, director or supervising administrator (No stamped signatures will be accepted!)
- ✓ For more detailed information refer to District Travel and Mileage Reimbursement procedures

## PowerPoint – Reimbursement Procedures (only specific slides)

### Travel & Mileage Reimbursement Procedures



- Important to provide a copy of these procedures to any employee traveling on school business (AP section, pg6-10)
- Reminder - Gratuity must be on receipt in order to be reimbursed (okay on customer copy of charge receipt)
- This is the only time tax can be reimbursed

### Travel Reimbursement Accounts Payable Voucher



- Completed by employee – must be signed by employee and administrator (principal or supervisory administrator) *example 4*
- No Cursive on ap vouchers
- Must have name, home address & empl ID #
- Must attach copy **approved** professional meeting request
- Travel Log – must be completed if travel is 2 or more days (example 5)



## Travel Reimbursement Accounts Payable Voucher (cont)



- Secretary/Treasurer should check:
  - Amounts don't exceed line items on approved PMR
  - For accuracy on completing entire form - no cursive
  - Appropriate account number on voucher ('580' line)
  - Employee ID # (from cert list or TCP)
  - If 2 days or more must include completed travel log
  - Must have **original itemized** receipts (not just charge receipt)
  - Each receipt amount must be listed (usually on log)
  - Have appropriate signatures (employee & principal)

## Other Reimbursements – Accounts Payable Voucher



- Completed by employee
- Must be signed by employee and administrator
- Each receipt listed on separate line
- Must have employee home address & school
- Secretary/Treasurer should check for accuracy:
  - Cannot reimburse tax
  - Account number & **employee ID #** on voucher
  - Must have **original itemized** receipt(s)
  - Have appropriate signatures