

HIGHLAND PARK ISD TRAVEL CHECKLIST

District Travel is a privilege and we recognize its importance for training as well as continued learning! School Board Policy DEE Local states: "Prior approval required – An employee shall be reimbursed for reasonable, allowable expenses incurred in carrying out the District business only with the prior approval of employee's supervisor and in accordance with administrative regulations."

Preparation:

- ☐ Verify conference/professional learning relates to the employee's role/position with the District.
- ☐ Verify all steps in "Preparation" and "Before the Trip" are complete **21-days** prior to travel.
- ☐ Obtain Approval from Supervisor: Pre-approval and verification of funds is required for all travel.
 - Out-of-State Travel requires approval from Assistant Superintendent of Business Services
 - Out-of-Country Travel requires Superintendent approval
- ☐ Download Travel Voucher Form.
- ☐ Obtain copy of training/conference brochure to verify the registration fee and **deadline(s)**.
 - **Travelers may be held personally liable for upgrades not required and late registration charges.**
 - **If room rate exceeds conference room rate, then prior approval from Business Services is required.**

Before the Trip (as applicable):

Do not use a Travel Credit Card without a PO. Also, please note that use of travel sites like Expedia, Orbitz etc. will not be allowed.

- ☐ Obtain a copy of cost for flights by traveler or Admin Assistant. (No pre-board, no upgrade charges, etc.). Flights on Southwest Airlines should be Wanna Get Away fares. Other airline reservations should follow reasonable standard fare. The departure and return dates of the flight shall be based on the start and end times of the travel event and the distance of the travel location.
- ☐ Obtain completed copy of the travel event registration form and Schedule of Events.
- ☐ Obtain a copy of the hotel reservation confirmation with the estimated charges. The covered expense/reimbursable room rate is the rate provided by the conference rate for hotel rooms.
- ☐ Obtain a copy of the rental car reservation confirmation with the estimated charges (including fuel).
- ☐ Obtain documentation for anticipated taxi/uber/shuttle costs (Tips are not reimbursable if not itemized on the receipt given by the transportation company).
- ☐ Prepare Meal Calculation worksheet for anticipated meal per diem. Adjust the requested amount for meals when the conference will include any meals. Meal per diems are not provided and meals are not reimbursable for travel within 50-miles of the District (non-overnight employee travel). Rates are as follows:
\$12 Breakfast - \$15 Lunch - \$26 Dinner
Departure Time: Before 8:00 – all meals; 8:00 – 12:00 – Lunch and dinner; 12:00 – 6:00pm – dinner only
Return Time: 8:00 – 12:00 – breakfast only; 12:00 – 6:00pm – breakfast & lunch; after 6:00pm – all meals
- ☐ Download a mileage guide (Mapquest, etc) printout with the anticipated total miles to be driven to/from the travel event. (Work week is from District Assignment Location to event; Non-work days from home to event) **This can be advanced. Current rate is .725 cents per mile.**
- ☐ Submit a Travel Voucher form to your supervisor as applicable.
- ☐ Submit an on-line Skyward requisition for all anticipated travel expenditures with attachments for all documentation collected above. Traveler will be the "vendor". **(Admin. Assistants shall complete for travelers.)**
 - All requisitions must reflect the event, city of travel, date(s) of travel, traveler(s) and budget code(s).
 - Supervisors and travelers should sign the Voucher and forward to the Business Office (Ellen Logan) for approval.
 - After Business Office approval, payment is processed for meal per diem and mileage approximately one week before trip. All other reimbursements require an itemized receipt and are processed the day approved.

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During the Trip:

- ☐ A detailed, itemized receipt is required for all expenditures except meal per diem and mileage.
- ☐ In the event that the trip is extended due to extenuating circumstances, such as weather or other delays, contact your immediate supervisor and the Business Office to request additional funds and an extension in the authorized travel dates.

After the Trip (as applicable):

- ☐ Complete and submit the final approval travel voucher form **within 5 days of completing the trip.**
 - Attach detailed, itemized receipts for all transportation (taxis, shuttles, rental cars, parking, etc), hotel receipts (State Occupancy Tax in Texas will not be reimbursed) and other non-anticipated expenses.
 - Supervisors should review and sign the Travel Voucher form and forward with all supporting receipts to the Business Office for verification and approval to ensure that the traveler complied with the District Travel Guidelines prior to approval of the Travel Voucher form.
 - Must provide BADGE/PROOF OF ATTENDANCE

An ACH reimbursement will be issued to the traveler after review and approval of the Travel Voucher form.

STUDENT/SPONSOR TRAVEL

Meal Checklist with Students & Employees for Student Travel:

- ☐ Student Meals: Attach a list of students to support the number of meals requested for co-curricular or extra-curricular events, if applicable. The District reimbursement rates for in-state and out-of-state travel for students is \$10 per meal not provided by hotel or event. Sponsors may give students their allotted amount when a sign sheet is provided to verify receipt. If dining as a group, please submit paid receipt.
- ☐ If the actual costs are less than the advanced per diem, then the sponsor must reimburse the unspent funds to the District within 10 days of the travel event

ENJOY YOUR TRIP!!!