



EMPLOYEE TRAVEL GUIDELINES

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Sharyland ISD Board Policy

Sharyland ISD
108911

DEE
(Local)

Compensation and
Benefits
Expense Reimbursement

Prior
Approval
Required

An employee shall be reimbursed for reasonable, allowable expenses incurred in carrying out District business only with the prior approval of the employee's supervisor and in accordance with administrative regulations

Out-of-State Travel

Out-of-state travel by District employees shall require approval by the Board and shall be approved only for travel related to national conferences.

Documentation
Required

For any allowable expense incurred, the employee shall submit a statement, with receipts to the extent feasible, documenting actual expenses.

Exception

Expenses for meals associated with authorized overnight travel not related to a state or federal grant shall be paid to employees on a per diem basis. No receipts shall be required for expenses paid on a per diem basis.

Employee Travel Guidelines

All receipts must be turned into the account payable department within five days of completion of travel. If receipts are not submitted, or travel is not verified and reconciled, the traveler will be responsible for reimbursement for all expenses previously paid by the district.

REGISTRATION: A registration form must be attached to the travel form. It is the responsibility of the employee to make sure they are registered on time.

LODGING: School districts are exempt from Texas state sales tax on lodging but are not exempt from city taxes or other taxes imposed for lodging. The maximum nights of lodging shall be based on the start and end times of the travel event and the distance of the travel location. Lodging costs that exceed the required minimum shall not be deemed necessary or allowable travel costs.

Lodging will be paid based on the following:

- Adults – 2 per room/separate rooms for males and females

When a traveler shares lodging with a non-district employee or requests a private room, the maximum lodging costs shall be the appropriate GSA schedule rate for single occupancy. The employee will be responsible for any amount over the single occupancy rate. Campus activity and student activity funds cannot be used to pay the difference.

The link below to the Domestic Maximum Per Diem Rates should be used to determine the appropriate rates for in state and out-of-state travel: <https://www.gsa.gov/portal/category/104711>

TRANSPORTATION: Travelers should use a district-owned vehicle as the preferred method of transportation. Employees must check with the transportation department on the availability of a district-owned vehicle. If no district vehicle is available, travelers will need to secure a rental car. Travelers will be responsible for picking up and returning the rental vehicle.

- Travelers who choose to drive their personal vehicle instead of a district-owned vehicle will no longer be reimbursed for mileage, parking fees, etc. The ONLY exception to this will be an email from your campus/department supervisor AND Assistant Superintendent approving the traveler taking their personal vehicle which must include an explanation of why the traveler cannot take a district-owned vehicle or rental. The traveler shall then be reimbursed at the current mileage rate established by the Texas Comptroller and/or TEA.
- For district-owned vehicles and rental vehicles, the traveler will check out a gas credit card for fuel with and provide the account number and current balance. The traveler will NOT check out a district credit card for fuel in their personal vehicle. Travelers will be required to submit fuel receipts, if any, for travel in a rental or district-owned vehicle. Travelers will not be required to submit any fuel receipts for travel in a personal vehicle.
- When multiple employees are traveling to the same destination and decide to travel in their personal vehicles, the mileage will be split evenly between travelers (up to four travelers).

RESERVATIONS: The employee is responsible for making reservations. The reservation confirmation form must be included with the travel request form. Request the state rate for government entities when making reservations. No third party reservations allowed.

Travel expenses are the ordinary and necessary expenses of traveling away from home for work. The IRS defines traveling away from home if your duties require you to be away from the general

area of your place of work substantially longer than an ordinary day's work, and you need to get sleep or rest to meet the demands of your work while away.

All employee travel must be pre-approved by campus administration, regardless of whether or not an advance is desired. An employee requesting travel and subsistence must fill out a travel request form and submit to the Purchasing Department three weeks prior to travel.

Required Documentation for Employee Travel

Travel costs must be properly documented to be reimbursable. The employee must document travel costs with a travel request form through Laserfiche. Auditable documentation must include the following at a minimum:

- Name of the individual requesting travel reimbursement
- Approved Skyward Time-Off request
- Destination and purpose of the trip
 - Conference/convention agenda and registration confirmation page.
- Dates of travel
- Electronic mapping source (not to exceed reimbursement at the maximum allowable rate)
- Actual amount expended on lodging per day, with a receipt attached (may not exceed the maximum allowable)
- Actual amount expended on meals per day (may not exceed the maximum allowable; tips and gratuities are not reimbursable)
- Actual amount expended on public transportation, such as taxis and shuttles
- Actual amount expended on a rental car, with a receipt attached and justification for why a rental car was necessary and how it was more cost effective than alternate transportation; receipts for any gasoline purchased for the rental car must be attached (mileage is not reimbursed for a rental car— only the cost of gasoline is reimbursed)
- Actual amount expended on incidentals, such as hotel taxes, copying of materials, and other costs associated with the travel
- Total amount reimbursed to the employee

Travel costs that are not supported by proper documentation as described above are not allowable to be charged to TEA grants and are subject to disallowance by state and federal auditors and monitors.

Unallowable Expenses

The following travel expenses are not allowable:

- First-class air fare
- Tips or gratuities of any kind
- Alcoholic beverages
- Entertainment & recreation
- Any expense for other persons

Travel costs not supported by proper documentation are not allowable to be charged to TEA grants and are subject to disallowance by state and federal auditors and monitors.

District vehicles:

- Smoking is prohibited while using a district vehicle.
- Personal errands are not allowed in a district vehicle.
- All traffic citations in district vehicles are the responsibility of the driver.
- Remember that you are representing Sharyland I.S.D.

PRE-TRIP PROCEDURES

Since planning is crucial to any trip and time is of the essence, please complete and submit a Travel Request Form **at least 21 calendar days prior to travel** and receive necessary approvals.

AFTER THE TRIP PROCEDURES

Since mileage, per diem, parking and taxi fares will no longer be issued prior to the travel, it is crucial that the employee submit requisition in skyward and submit MapQuest or google maps, receipts for other expenses, and a copy of the approved travel request form five days after the travel for payment.

MILEAGE

Travelers are required to calculate mileage by using an electronic mapping source Google Maps or (www.Mapquest.com). The traveler must print out the driving directions provided by the site and attach them to the travel request form.

Travelers are required to select the shortest and most economical route but may justify the selection of another route if it was chosen for safety reasons and specific justification of the selection is given.

The mileage and lodging reimbursement rates published by the comptroller apply to all travel reimbursement rates.

MEALS

Meal per diem amounts are paid for overnight travel up to \$40 per day. No receipts are required. This reimbursement is not necessarily to cover the total cost of meals while the employee is traveling, but to reimburse reasonable incremental costs of meals the employee may incur by virtue of such business travel. The following chart indicates departure and arrival times from and back to Sharyland to calculate meal eligibility.

The following maximum meal and lodging reimbursement rates apply to in-state and out-of-state travel.

- If local policy restricts travel, per diem, and other travel expenses to a rate less than state law, the applicant must budget and request reimbursement from the grant at the lesser rate.
- Travel allowances, in which the per diem is paid to the employee regardless of the amount actually expended, are not allowable.
- Meals will not be reimbursed for travel that does not include an overnight stay.
- Meals will be reimbursed for actual expenses up to the local policy per diem rate allowed.

Meal Type	Rate	Must leave Before	Must Return After
Breakfast	\$7.00	6:00 A.M.	8:00 A.M.
Lunch	\$13.00	11:00 A.M.	2:00 P.M.
Dinner	\$20.00	4:00 P.M.	6:00 P.M.

- When staff travels with students the student per diem rate applies.
 - \$7.00 per meal, \$8.00 per meal for out of District travel

LODGING

As per Texas State Comptroller's website: www.gsa.gov/portal/content/104877 Hotel and county taxes are not included in the maximum amount.

PARKING AND TAXI FARES

Parking fees are not advanced prior to the trip. Valet parking is not allowed. Parking fees will be reimbursed with original ticket only if it is for the official business of the meeting, conference or workshop.

Reimbursement for Travel Not Taken

If an employee is not able to attend scheduled travel, the employee is responsible for canceling reservations prior to the time an actual expense is incurred. The district will not reimburse employees for out of pocket travel expenses, unless the travel is cancelled at the direction of the Superintendent due to the needs of the district. In such an instance, the district will only reimburse charges incurred and previously paid by the employee. For example, the district will reimburse lodging expenses if the Superintendent made the decision for an employee not to attend; and it was too late to cancel a lodging reservation without incurring an expense. An employee unable to attend travel for personal reasons is personally responsible for any expenses previously paid by the district.

Gas Card Request Form



SHARYLAND PURCHASING OFFICE

GAS CARD REQUEST FORM

Date: _____ Employee name: _____

Contact Phone: _____ Trip Destination: _____

Trip Date: _____ Round Trip Distance: _____

No. of Vehicles: ____ Type of Vehicle(s): vehicle 1 _____ vehicle 2 _____

Budget Code: _____

Credit card type: EXXON VALERO

Card number: _____

I have received the fuel credit card indicated above. I take responsibility for all expenses charged to this credit card and I agree to the following:

- Use of the corporate credit card is for business-related expenses.
- Personal expenses may not be charged to the corporate credit card.
- All receipts for charges to the credit card must be submitted to the campus/department secretary.
- The corporate credit card must be returned to the purchasing department immediately after trip.

I have read, understand and agree to the above-mentioned terms governing the use of the fuel credit card. I understand misuse or abuse of this credit card or willful violation of the terms of this agreement may result in personal financial liability and disciplinary action, including discharge.

Employee Signature

Date

Printed Name