

Sherman ISD Travel Procedures

Revised 1-9-2020

Employee Travel

Employees should complete and submit the Sherman ISD travel form for approval before completing any travel arrangements. Employees can request advanced payment for travel and submit the reconciliation form within 30 days after the travel or obtain approval for the travel by completing the travel form and request reimbursement after completing the travel by completing the reconciliation form. **All travel reimbursement requests and travel supporting documentation should be returned to the Finance Office no later than 30 days after you return from your trip, or when you incurred the expense. Any reimbursement requests received later than 40 days will not be paid. Employees that do not submit supporting documentation will have the amount added to their compensation.**

Supporting documentation is required for lodging (lodging receipt and training agenda), **Transportation** (Mileage should be calculated by using Mapquest.com. Employees will use their campus or assignment location as the beginning address, unless they are leaving from their residence and their residence is closer to the destination. A copy of the Mapquest calculation should be attached to the travel request.) **Airfare, taxi, parking, tolls, registration, conference materials, and other expenditures require receipts for reimbursements.**

Employee Overnight Stay

Overnight stay for the district is allowed for events outside a 60 mile radius from your campus, the Administration building, or your residence if your residence is closer to the destination.

Hotel bills need to show a "\$0." balance. (i.e. no express check out) Upon arrival, present the Hotel Occupancy Tax Exemption Form which you received from the Finance Office. State taxes cannot be paid from district funds. Check your hotel bill to ensure that the only tax is for city and county. Lodging should be reserved through the hotel and not through an outside source such as Orbitz, Expedia, Travelocity, etc., because outside sources require payment in advance and will not remove the state taxes.

According to the IRS, the definition of travel expenses is expenses of traveling away from home. You are traveling away from home if: (1) Your duties require you to be away from your tax home substantially longer than an ordinary day's work and (2) you need to sleep or rest to meet the demands of your work while away from home. A "Tax home" includes the entire city or general area in which your business or work is located.

Employee Meal Allowance

Meals will be reimbursed on the daily per diem rate. The daily per diem rate for employees is \$36. Meals, not associated with student travel, must involve an overnight stay. Use the following times for per diem meal claims:

Breakfast	\$8.00	Depart before 6:00 a.m.
Lunch	\$10.00	Depart before 11:30 a.m.
Dinner	\$18.00	Return after 6:00 p.m.

Federal and state grants do not allow the per diem method and require receipts for all travel expenditures. Also, if Federal or state grant funds are utilized for travel, the District must use the federal rates provided by the General Services Administration for both in-state and out-of-state travel within the contiguous United States.

Employee Travel not requiring overnight (school employees)

Meals are not reimbursable for employees of the district if it is not necessary to stay overnight. This includes one day workshops at ESC Region X.

Employee Out-of-District Travel (Mileage Reimbursement)

Employees must complete a travel reimbursement form in order to be reimbursed for expenses occurring while traveling on school business. The form can be found on the district’s website under the Finance Office. The immediate supervisor must approve travel before departure.

Employee travel will be reimbursed at the rate of **\$.575** per mile for use of their personal vehicle. This rate is subject to annual review. The district will use the Mapquest website at <http://maps.quest.com> to estimate mileage between duty points. Travelers must attach a copy of the mileage estimate showing the miles and directions from your campus to the conference/hotel as supporting documentation. No additional miles traveled within the city will be reimbursed unless the miles have school business purpose.

Only one person out of a group of four may be reimbursed for mileage. (ex. If five teachers travel to Austin for the same workshop in the same day or Region X, only two teachers are eligible for mileage reimbursement).

Rental car cost (plus gasoline) is sometimes more economical than mileage paid for driving a personal vehicle, and the lowest cost should be chosen over personal preference.

Employee Out-of State Travel

Out-of-state travel must be pre-approved by the Superintendent before a travel request is entered.

Employee Vehicle Insurance

When a district employee’s personal auto is used for school-related business, the personal auto policy in effect for the vehicle is the primary source of recover. Injured passengers could collect under the personal injury protection coverage afforded under that personal auto policy, as well as pursuing excess injury coverage through their own auto policies.

Student Travel

Advance payment may be requested for necessary expenses expected to be incurred by athletic teams and other groups engaged in out-of-town travel. Student meals (6412) are \$7.00 per meal per student. Student signature forms must be used and submitted to the Finance office no later than 15 days after you return from the trip.

The following are the procedures for student travel:

- The activity sponsor (coach, club sponsor, etc.) shall make a written request to their campus for an advance, stating the amount needed, date of activity, and the purpose for which advance is required.
- The campus bookkeeper will enter a requisition for advance funds- requesting a check. A list of students and faculty/staff members who will be traveling is forwarded to the Finance Office with the requisition.
- Not more than two days before departure date, faculty/staff advisor of the student group may pick up the check in advance from the Finance Office.
- During trip, faculty/staff advisor obtains signatures of those receiving meals and/or cash for meals.

Upon return the faculty/staff advisor returns completed signature list and any money not expended to the Finance Office.

Chaperone Trip Costs

Costs related to volunteer chaperones must be acceptable and necessary for the responsibilities assigned to the chaperone. The costs must also be approved by the principal. Should a travel advance for trip-related expenses be provided to the chaperone, the chaperone must authorize, in writing, receipt of the funds. Chaperones will not be reimbursed for expenses above the amount advanced by the District.