

TRAVEL POLICY PROCEDURES

Melissa Johnson, Jefferson County Board of Education

WHAT TO INCLUDE IN THE TRAVEL POLICY

- When travel is appropriate
 - In the course performing work duties for your place of employment
- What type of forms will be used
 - Professional Development form
 - Travel Reimbursement form
- What will be reimbursable, if paid for by employee
 - The cost of registration
 - Hotel
 - Airfare
 - Mileage
 - Per Diem
 - Miscellaneous

JEFFERSON COUNTY BOARD OF EDUCATION
 PROFESSIONAL DEVELOPMENT REQUEST FORM
 FORMS MUST BE COMPLETED AND SUBMITTED NO LATER THAN 10 DAYS PRIOR TO THE CONFERENCE. A
 CONFERENCE AGENDA AND REGISTRATION FORM SHOULD BE ATTACHED

ALL TRAVEL REIMBURSEMENT WILL BE MADE IN ACCORDANCE WITH THE BOARD APPROVED TRAVEL POLICY.

EMPLOYEE NAME	BASE SCHOOL/DEPARTMENT <small>BASE</small>	TITLE OF CONFERENCE												
LOCATION OF CONFERENCE	DATES OF CONFERENCE _____ To _____	DATES OF TRAVEL _____ To _____												
MODE OF TRAVEL <input type="checkbox"/> Personal Vehicle <input type="checkbox"/> Airplane-Refundable Tickets Only <input type="checkbox"/> Ride with Co-Worker <input type="checkbox"/> N/A		SUBSTITUTE REQUIRED <input type="checkbox"/> Yes <input type="checkbox"/> No DATES NEEDED TO _____												
FUNDING SOURCE: <input type="radio"/> State Professional Development Allocation <input type="radio"/> ARI <input type="radio"/> Local School Public Funds <input type="radio"/> Local School Non-Public Funds <input type="radio"/> CNP <input type="radio"/> Title I, II, III, IV or V <input type="radio"/> Federal Career Tech <input type="radio"/> Enhancing Ed Thru Technology <input type="radio"/> Teaching American History Grant <input type="radio"/> Federal Exceptional Ed <input type="radio"/> _____ Department														
TOTAL ESTIMATED EXPENSES (Total Will Autofill From Below) \$ <u>0</u>														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Approval Signatures</th> <th style="width: 40%;">Dates</th> </tr> </thead> <tbody> <tr> <td>Employee Signature</td> <td></td> </tr> <tr> <td>Principal/Director Signature</td> <td></td> </tr> <tr> <td>Federal Program Coordinator**</td> <td></td> </tr> <tr> <td>Deputy Superintendent Signature***</td> <td></td> </tr> <tr> <td>Superintendent Signature (Out of State)</td> <td></td> </tr> </tbody> </table>			Approval Signatures	Dates	Employee Signature		Principal/Director Signature		Federal Program Coordinator**		Deputy Superintendent Signature***		Superintendent Signature (Out of State)	
Approval Signatures	Dates													
Employee Signature														
Principal/Director Signature														
Federal Program Coordinator**														
Deputy Superintendent Signature***														
Superintendent Signature (Out of State)														
GL CODE _____														

Estimated Expenses	Amount
Registration Expense	
Hotel Expense	
Flight Expense	
Mileage Expense	
Per Diem (1st & last day @ 75%)	
Misc. Expense	
Substitute Expense	
Total Estimated Expenses	\$ 0

PROFESSIONAL DEVELOPMENT IS ONLY APPROVED FOR THE TOTAL ESTIMATED EXPENSES AMOUNT SUBMITTED ON THIS FORM.

****Federal Program Coordinator always approves if estimated expenses are funded with federal funds.**

*****Deputy Superintendent approves only if funded by local school/department and total estimated expenses are greater than \$500.**

PROFESSIONAL DEVELOPMENT TRAVEL PROCEDURES

- Professional Development form
 - Include all possible expenses for the professional development (registration, hotel, airfare, mileage, per diem, substitute, miscellaneous)
 - Do not break up professional development to avoid district policy
 - Obtain all appropriate approvals
 - Include a copy of the conference agenda, if applicable

PROFESSIONAL DEVELOPMENT TRAVEL PROCEDURES

- Registration
 - Once approved, pay for registration
 - Can be done by PO or p-card
- Booking Hotel and Flights
 - Once approved, book hotel and flights as soon as possible
 - Use p-card or personal credit/debit card

TRAVEL REIMBURSEMENT FORM



**JEFFERSON
COUNTY SCHOOLS**

EMPLOYEE NAME _____
 HOME ADDRESS _____
 BASE _____
 DESTINATION OF TRAVEL
 (INCLUDING CITY/STATE) _____
 DATES OF TRAVEL BEGINNING ENDING

MILEAGE EXPENSE FROM HOME (Home or Base, whichever is closer)
 TO ADDRESS

ROUNDTrip _____ MILES @ \$ 0.73 CENTS/MILE 0.00

Registration Expense (IF PURCHASED BY EMPLOYEE-ATTACH RECEIPT) _____ 0.00

MEAL PER DIEM-1ST AND LAST DAY (75% GSA PER DIEM) (OVERNIGHT TRIPS ONLY) _____ DAYS @ _____ 0.00

MEAL PER DIEM-ALL OTHER DAYS (100% GSA PER DIEM) (OVERNIGHT TRIPS ONLY) _____ DAYS @ _____ 0.00

MEAL EXPENSES-OUT OF COUNTRY PD ONLY (ATTACH ORIGINAL RECEIPTS) _____ 0.00

HOTEL EXPENSES (IF PURCHASED BY EMPLOYEE-ATTACH RECEIPT) _____ NIGHTS @ _____ 0.00

CHECK IF CONFERENCE HOTEL (ATTACH DOCUMENTATION)

AIRLINE TICKETS (IF PURCHASED BY EMPLOYEE-ATTACH RECEIPT) _____ 0.00

OTHER/MISC TRAVEL EXPENSES (ATTACH ORIGINAL RECEIPT)	EXPENSE	AMOUNT
_____	_____	_____
_____	_____	\$ 0.00
_____	_____	_____

GL CODE: _____ GRAND TOTAL TO BE REIMBURSED \$ 0.00

ATTACH A COPY OF APPROVED PROFESSIONAL DEVELOPMENT FORM, AGENDA AND CERTIFICATE OF ATTENDANCE (IF AVAILABLE)

I HEREBY CERTIFY THAT THE ABOVE IS A CORRECT STATEMENT OF EXPENSES INCURRED BY ME IN THE PERFORMANCE OF OFFICIAL DUTIES FOR THE JEFFERSON COUNTY BOARD OF EDUCATION.

EMPLOYEE SIGNATURE _____ DATE _____

PRINCIPAL'S/DIRECTOR'S SIGNATURE _____ DATE _____

TRAVEL REIMBURSEMENT PROCEDURES

- Mileage reimbursement
 - Calculate the total round trip mileage from base or home (whichever is shortest distance)
 - Multiply by mileage reimbursement rate
 - Include maps as supporting documentation (Google Maps or MapQuest)

TRAVEL REIMBURSEMENT PROCEDURES

- Per Diem Reimbursement
 - Either reimburse by set per diem rates or by actual meal receipts
 - If reimbursing by set per diem rates (such as GSA), take the number of days of travel and multiply by the rate. GSA has a reimbursement rate of 75% of the daily rate for the first and last day of travel.
 - If reimbursing by actual meal receipts, the receipts must be included with the supporting documentation. They must also be reasonable and allowable.

TRAVEL REIMBURSEMENT PROCEDURES

- Hotel Reimbursement

- If the employee used a personal card to pay for the hotel, original receipts must be turned in for reimbursement
- A cap on reimbursement can be set, such as 2 times the GSA daily rate OR no more than the host hotel rate
- Incidental expenses are typically not reimbursed; the employee is responsible for these expenses

TRAVEL REIMBURSEMENT PROCEDURES

- Airline Tickets

- If an employee pays for their own airline tickets, reimbursement can be made as long as original ticket receipts are turned in
- Must be reasonable and allowable

TRAVEL REIMBURSEMENT PROCEDURES

- Miscellaneous Expenses
 - Any miscellaneous expenses to be reimbursed, such as parking at the hotel, etc., should have original receipts turned in
- All reimbursements should include the conference agenda and approved professional development form

LOCAL MILEAGE REIMBURSEMENT

- You may elect to reimburse local mileage, such as campus to campus mileage or mileage to local conferences
- A form detailing the dates of travel and the mileage incurred should be completed for reimbursement, include mileage calculations (Google Maps or MapQuest)

COMMON ISSUES WITH TRAVEL PROCEDURES

- Appropriate approvals not obtained
 - From Supervisor/Principal
 - From Deputy Superintendent
 - From Superintendent
- Missing documentation
 - No agenda
 - No original receipts
- Calculations done incorrectly
 - Wrong per diem used
 - Wrong mileage rate used
 - Hotel rate incorrect

QUESTIONS??

Contact Information

Melissa Johnson

mtjohnson@jefcoed.com

205-379-2109