

COMPENSATION AND BENEFITS:  
EXPENSE REIMBURSEMENT

DEE  
(REGULATION)

Employees of the District shall be reimbursed for travel expenses incurred outside the District while performing duties related to their jobs provided the request for reimbursement within 30 days. (See Reimbursement Procedures below.) Prior approval for all travel shall be obtained from the employee's immediate supervisor and from the Superintendent or his/her designee before travel expenses are incurred.

Travel expenses shall be reimbursed for the employee only; an accompanying spouse's expenses shall not be covered.

AUTHORIZATION  
FOR TRAVEL

The following provisions apply to all travel, including travel that is paid for with Title funds, grant funds, and other special funds.

Employees of the District shall be reimbursed for travel expenses outside the District incurred while performing duties related to their jobs only when such travel is approved according to the following guidelines.

All travel outside the District shall be at the request of the employee's immediate supervisor and shall be approved by a director, chief or the Superintendent. Prior approval for all travel shall be obtained using the District's online Release Time Request Form before any travel expenses are incurred.

Reimbursement for authorized travel shall be in accordance with legal requirements and with guidelines found in DEE (REGULATION).

All staff must submit an online Release Time Request Form at least three weeks prior to the anticipated time of travel whenever possible.

Before any travel expenses are incurred, Release Time Request Form must be entered in the District's online computer system and will be routed to the immediate supervisor and appropriate chief of officer for approval. The supervisor, in turn, will route the request to the next appropriate level for approval. (In some cases, additional approval is required from individuals with budget authority over requested funds.)

Approval from the Superintendent is required for *all* requests to travel out of state.

Funding sources should be ascertained prior to submitting a request. Inquiries concerning availability of funds shall first be directed to the immediate supervisor.

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Employees should make every effort to select the most efficient and cost effective method of travel including but not limited to airfare, hotel, and transportation.

RESTRICTIONS

Out of District travel that cannot be documented as relating directly to the Plan for District Improvement, the Campus Improvement Plan or the implementation of Professional Learning Communities shall not be approved.

Out of State travel shall be limited to the 48 contiguous United States unless approved by the Superintendent.

Out of District travel for employees planning to resign or retire within six months of the event/conference shall not be approved.

EXCEPTIONS

The above restrictions shall not apply to travel that is connected with:

1. A requirement by law under state or federal programs;
2. Authorized participation in professional organizations;
3. Personal or professional recognitions;
4. Requirement training connected with either the federal or state accountability system; or
5. Testimony before regulatory agencies or in a court of law.

IN DISTRICT TRAVEL

Travel within the District is a requirement for many job classifications. Compensation for travel within the District shall be considered when the employment contract is offered or reimbursed as detailed in personal automobile transportation reimbursement.

REIMBURSEMENT  
PROCEDURES

Employees may request reimbursement for expenses incurred when approval has been given for expenditure of District funds. In some cases, a "cap" or limit will be given for the amount of District funds that can be requested for reimbursement. When a limit is given, the reimbursement request shall not be for an amount that is higher than the limit.

A reimbursement request must be submitted within 30 calendar days of return from the trip or from the date of the reimbursable expense. Requests submitted after 30 days will be denied. The reimbursement request must be completed using the District's online computer system.

For travel reimbursements, a hard copy of the request must be printed. ALL RECEIPTS for accommodations, ground travel, parking and other travel expenses must be attached, and the reimbursement request must be submitted to the immediate supervisor. Airline

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receipts, when purchased by the traveler, must accompany the reimbursement request. Reimbursement for meals does not require receipts if the employee chooses the per diem.

For expenses other than travel, a voucher should be entered for reimbursement with all receipts attached.

The supervisor may request a report describing the conference. If so, the report must accompany the reimbursement request before reimbursement can be made. This report must be completed using the Conference Evaluation portion of the PeopleSoft release time application.

TRANSPORTATION

Reimbursement for transportation shall be based on the most efficient and cost effective means of travel available.

1. Personal Automobile – Reimbursement for official travel shall be made at the current IRS reimbursement rate. 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. Mileage for personal reasons, including travel to and from work, is not reimbursable.
2. Air Travel – Reimbursement for tickets purchased by the employee shall be for coach class rates. First class and business class fares will be reimbursed only if no other lower airfares are available.
3. Taxi and/or Limousine – Necessary travel by taxi and/or limousine shall be reimbursed.
4. Vehicle Rental – Prior approval is required. The District will reimburse for the costs of the car rental, plus the car rental agency's collision insurance and fuel. See Vehicle Rental below.

Airline tickets may be ordered through the District's travel agency and charged to the District prior to travel. An approved online Release Time request form is required prior to charging the airline tickets to the District. If necessary, the employee may purchase airline tickets and a request for reimbursement submitted with other travel expenses after returning from the trip.

Airline tickets ordered through the District's travel agency would generally be ticketless and a picture ID will be required to travel.

VEHICLE RENTAL

Prior approval for vehicle rental must be obtained. For out-of-state travel, if public transportation is not practical, the appropriate supervisor, chief officer, or assistant superintendent must approve vehicle rental. In no case may employees drive vehicles that are used to transport students on out-of-state trips.

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MEALS

For travel in or outside the State of Texas, the District will reimburse ACTUAL meal expenses only if an overnight stay is required. The employee may choose one of the following two methods for meal reimbursement. Only one method may be used for each trip.

- Method A: The maximum rate of reimbursement is \$36 per day. No receipts are required for this method.
- Method B: The maximum rate of reimbursement may not exceed the U.S. General Services Administration (GSA) Domestic Maximum Per Diem Rates for the travel destination. These rates can be found on the District website at "Travel Per Diem Rates" under the "Employees" tab. If the travel destination is not listed, the employee should use the standard GSA rate for the destination state. Detail meal receipts are required to be reimbursed under this method.

On the day of departure, the District will reimburse up to one-half of the applicable rate for meals when the departure is after 3:00 p.m., or up to the full amount for meals when the departure is before 3:00 p.m. On the day of return, the District will reimburse up to one-half the applicable rate for meals when the arrival is prior to 3:00 p.m. or the full amount for meals when the arrival is after 3:00 p.m. Reimbursement for alcoholic beverages is not allowed.

Reimbursement will be made for business meals. In the case of a business meal, a receipt is required along with the documentation of the business purpose of the meal and a list of the people attending the meal.

LODGING

Hotel and/or motel lodging expenses for travel in or outside the State of Texas shall be reimbursed at a rate not to exceed 200% of the U.S. General Services Administration (GSA) Maximum Lodging rate for the travel destination. This rate can be found on the District website at "Travel Per Diem Rates" under the "Employees" tab. If the travel destination is not listed, the employee should use the standard GSA rate for the destination state. An itemized receipt must be attached to the reimbursement request.

NOTE: Lodging rates that exceed the GSA maximum rates may *not* be charged to federal funds or to state special program allocation funds.

OTHER COSTS

Convention registration fees, tickets for required convention functions (not social functions), and other fees associated with the conference may be paid by the District with the approval of the supervisor. Receipts for expenses must be submitted with the reimbursement request.

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The District will reimburse for incidentals that are necessary for District travel. These include business telephone calls, Internet access for business purposes, toll fees, parking fees, rental car gasoline, and required hotel taxes.

The District will not reimburse personal incidental expenses such as personal phone calls, movies, entertainment, laundry, alcoholic beverages, childcare, tips, gratuities, etc.