



Employee Travel Checklist

1. Before you travel

- Review District Travel Procedures which can be found on the District's website under – Departments – Business Office – Procedure Manuals – JISD Fiscal Manual – Travel Procedures -page 29.
- Obtain approval from immediate supervisor before making any travel arrangements. Out-of-state travel must be pre-approved by the Superintendent before a purchase order is processed. If using **Federal Funds**, complete and submit a **Federal Pre-Acquisition Form**. This form is located on the District's website under the Business Office – Forms.
- Complete purchase orders for conference registration, lodging and parking, employee reimbursement for meals, mileage and gas (Exxon card). Provide details including who is going, where they are going, and how long they are staying. **Overnight stay is allowed for events outside a 50 mile radius from your campus or the Administration Building.**
 - Purchase order for hotel – Bank of America travel card (cards are located in the Business Office). Please contact the Business Office at least 3 days prior to travel to check out a travel card. If a check is needed for hotel accommodations, the Purchase Order and reservation confirmation must be submitted at least two weeks prior to travel in order for the check to be printed in a timely manner. Refer to the GSA rates for hotel room rate allowance. Current rates are located on the District's website.
 - Registration fees – ask if Purchase Orders are accepted, if not, contact the Business Office for further instruction.
 - Staff meals and mileage – Purchase order for reimbursement to employee. (**See Mileage and Meal allowances on Employee Travel Reimbursement form**). **Meals are not reimbursable if it is not necessary to stay over-night.**
- Reserve district vehicles on the District's website under For Staff – Vehicle Reservation. Pick up keys from Tonya Gschnell in the JHS



Office. The designated driver must fill the gas tank to the original amount noted on the vehicle checkout form upon return and leave a copy of the receipt. If a district vehicle is unavailable, contact Candace Fuchs in the Business Office to reserve a vehicle from Enterprise or Avis.

- Complete a Travel Reimbursement Form.
- Complete a Hotel Occupancy Tax Exemption Certificate. This form must be presented when you check in. State occupancy taxes cannot be paid from District funds. If your hotel charges parking, you will also need a sales tax exempt form to remove state sales tax on parking.

2. While You Are Traveling

- Keep all receipts including those for hotel, parking, gas, meals, taxis, rental cars, etc. For most employees, meal receipts are not needed as the District reimburses meals on a Per Diem basis. However, for those individuals whose travel is paid with Federal Funds, detailed/itemized receipts are required for all expenditures, including meals. Per diems for meals are not allowed with Federal Funds. Combining multiple purchases for other individuals' meals on one receipt will not be accepted.
- Upon hotel checkout, the traveler should request a detailed receipt showing all charges and balances paid. This receipt must be turned in with your final travel report. Please ensure that all state occupancy and parking taxes are removed.

3. Upon Your Return

- Within 15 days of return, print, sign and submit the completed Request for Travel Reimbursement form and all detailed receipts to the Business Office (or Federal Program Director if using federal funds) including mileage, parking, meals, and other approved incidental costs. All required documentation must be submitted in order for the reimbursement to be processed.