



# PROFESSIONAL TRIP AUTHORIZATION AND EXPENSE REPORT

STAFF MEMBER \_\_\_\_\_ VENDOR # \_\_\_\_\_ PO# \_\_\_\_\_

SCHOOL/DEPARTMENT \_\_\_\_\_ POSITION HELD \_\_\_\_\_

TYPE OF CONFERENCE (INFO ATTACHED) \_\_\_\_\_ CITY/STATE \_\_\_\_\_ DEPARTURE DATE \_\_\_\_\_

NAMES OF OTHER STAFF MEMBERS ATTENDING \_\_\_\_\_ RETURN DATE \_\_\_\_\_

SUBSTITUTE TEACHER REQUIRED FOR \_\_\_\_\_ DAYS TRIP REQUESTED BY \_\_\_\_\_

BUDGET UNIT	ACCOUNT	AMOUNT

READ REGULATIONS ON REVERSE SIDE

## TRIP ADVANCE AUTHORIZATION

### ADVANCE REQUESTED

LODGING \$ \_\_\_\_\_ x \_\_\_\_\_ Day(s) \$ \_\_\_\_\_  
 FOOD \$ \_\_\_\_\_ x \_\_\_\_\_ Day(s) \$ \_\_\_\_\_  
 BAGGAGE FEE\*\* \$ \_\_\_\_\_ x \_\_\_\_\_ Day(s) \$ \_\_\_\_\_  
 OTHER\* (Be Specific) \_\_\_\_\_ \$ \_\_\_\_\_  
 TOTAL \_\_\_\_\_ \$ \_\_\_\_\_

### SIGNATURES

STAFF MEMBER \_\_\_\_\_  
 SUPERVISOR \_\_\_\_\_  
 BUDGET MANAGER \_\_\_\_\_

FINANCE OFFICE USE ONLY	
CHECK/EFT NO	_____
AMOUNT	\$ _____
DATE	_____

**Staff Member Acknowledgment:** By signing, I indicate I have read the regulations on the reverse side of this form, I understand the regulations and agree to adhere to them, and I accept the conditions placed on any and all advanced funds.

**ADVANCE WILL BE ISSUED NO EARLIER THAN TWO WEEKS PRIOR TO TRIP**

## FINAL EXPENSE REPORT

	ALLOWABLE EXPENSE	ACTUAL EXPENSE
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LODGING*	\$ _____	\$ _____
FOOD*	\$ _____	\$ _____
MILEAGE	\$ _____	\$ _____
BAGGAGE FEE**	\$ _____	\$ _____
OTHER* (Be Specific)	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

### SIGNATURES

STAFF MEMBER \_\_\_\_\_  
 SUPERVISOR \_\_\_\_\_  
 BUDGET MANAGER \_\_\_\_\_

FINANCE OFFICE USE ONLY	
TOTAL EXPENSE	\$ _____
ADVANCE	\$ _____
DUE TO STAFF MEMBER	\$ _____
DUE FROM STAFF MEMBER	\$ _____
RECEIVED _____	CHECK # _____
INITIALS _____	DATE _____

OTHER \_\_\_\_\_

\*ATTACH BILLS, RECEIPTS, ITEMIZED LIST, ETC.  
 COMPLETE ONLY IF PAID BY THE STAFF MEMBER  
 \*\*COMPLETE ONLY IF FLIGHT TRAVEL REQUIRED

## PROFESSIONAL TRIP REGULATIONS

All staff members planning to take a professional trip out of the Houston area and who are requesting an advance and/or reimbursement of expenses must submit a PROFESSIONAL TRIP AUTHORIZATION AND EXPENSE REPORT at least two weeks prior to trip. All applicable signatures must be obtained. A purchase order will be created for the expenses requested. The form will be distributed as follows:

- Returned to PO originator with check/eft amount, date, and number to be submitted as final expense report.
- The Final Expense Report section **must be completed and returned** 10 days after the travel date to the Finance office with appropriate documentation, even if no additional reimbursement is requested.

### **Trip expenses will be reimbursed on the following basis:**

**HOTEL:** Staff members attending the same event are expected to share rooms whenever appropriate. Staff members must provide the hotel with a Texas Hotel Tax Exemption form. Texas sales tax will not be reimbursed. Reimbursements will be made from an itemized hotel bill only. This is the responsibility of the staff member.

**MEALS:** An overnight stay is required. Meals will be reimbursed based on the actual amount expended on meals, not to exceed \$40.00 per day. Schools and departments may set a lower per diem basis as budget limitations dictate.

**TRANSPORTATION:** Transportation to an event will be based on a 150 air miles standard. All trips within 150 miles of the GMA Leadership Center will be by automobile and all other trips above 150 miles will be by air, unless the Superintendent, Associate Superintendent, Area Superintendent or Athletic Director determines a special exception exists.

1. **PERSONAL AUTOMOBILE:** Personal automobile travel will be reimbursed at the annually approved IRS mileage rate. Multiple staff attending the same event is expected to travel in one automobile whenever possible. This will include approved trips exceeding 150 miles.
2. **AIRFARE:** All airline ticketing will be done through SISD Travel-Procurement Department. Airfare is reimbursed at the coach fare unless extenuating circumstances are pre-approved.
3. **TAXI/SHUTTLE:** Exact cost with receipt.
4. **RENTAL AUTOMOBILE:** Rental automobiles of a midsize or lower rate through SISD Travel-Procurement Department when approved in advance by the Budget Manager.

**PARKING AND TOLLS:** Parking and tolls will be reimbursed at the exact cost with receipt. Texas sales tax will not be reimbursed.

**NO REIMBURSEMENT:** No reimbursement will be made for non-District fax, cleaning, entertainment, in-room movies, room service fee, alcohol, souvenirs, or spousal/family expenses. The district does not reimburse an employee for another employee's expenses incurred during travel on behalf of the district.

**REGISTRATION:** When possible, is to be paid directly to the conference or vendor with a Direct Pay Purchase Order. This is not normally included in a travel advance. Reimbursement to staff member will be made with proof of payment.

**REIMBURSEMENT OF UNUSED ADVANCE FUNDS:** Any amount advanced to an employee which is not used, or which are deemed not allowable under these regulations, shall be reimbursed to the district within 10 days of the date of travel indicated on page one of this form. If such amount is not reimbursed within the 10 day period, the employee expressly authorizes the district to recover such amount using a payroll deduction on the next available pay period.

For detailed information regarding Travel, please refer to the *Spring ISD Travel Guidelines and Procedures*.