

Employee Travel & Reimbursement Guide

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Conferences

Pre-approval and completion of a “District PD Request Form” is required for all conferences, workshops and trainings (the event), except in the following circumstances:

- The event is held on District property.
- The event is sponsored by Lake Superior School District.

The Professional Development Request form can be found on the District website under Staff/HR/Forms and Guidance.

While attending district approved events, employees are expected to represent the district in a professional manner. Failure to do may result in disciplinary action up to and including termination.

Expenses will be reimbursed under the guidelines detailed below and must be reasonable and necessary to the approved event. Additionally, the reimbursement request must include original, detailed (itemized) receipts that reflect the total amount paid, each item purchased, the date and payment method. Summary receipts are not acceptable and will not be reimbursed as there is no ability to verify the number of meals purchased or that no alcohol was purchased.

Reimbursement requests should be submitted within sixty (60) days of the event. Reimbursement requests submitted after sixty (60) days are subject to tax withholding per IRS rules.

Completing the District PD Request Form (Prior to Conference)

To attend a professional development conference, workshop or training utilizing district funds (including mileage reimbursement), the following steps are required:

- Conference Pre-Approval Request Form must be approved in advance and prior to registration.
- Employee attending the conference must completely fill out the form. Forward the form to the appropriate Supervisor/Principal for approval with supporting documentation attached.
- Once approved, an original with attachments is returned to the Employee.

Registration

Necessary registration fees may be paid once pre-approval is obtained. If a district check is required, the Business Office will process a check once the completed pre-approval form and Expense Request form is received. If a district P-card is used, a copy of the conference pre-approval form and applicable receipt(s) must be included with the cardholders P-card documentation for that month. Attending employee is responsible for ensuring they are registered and for notifying the appropriate personnel if the conference is subsequently cancelled or if they do not attend.

Lodging

The actual cost of any reasonable lodging for pre-approved conferences may be reimbursed under the following condition:

- Lodging one night prior to a multi-day event and between event days if the event is located in excess of 80 miles from the lesser of distance from home or distance from primary worksite.
- Lodging one night prior for single day events if the event is located in excess of 150 miles from the lesser of distance from home or distance from primary worksite.

Lodging arrangements are generally the responsibility of the traveling employee, once pre-approval has been obtained. Prudent judgement shall be used to seek reasonably priced accommodations.

Reimbursements shall be limited to single occupancy rates. When more than one person is attending an event, employees of like gender are encouraged to share a room when reasonable. Incidental costs such as personal telephone calls, in-room movies, etc. will not be reimbursed.

Mileage

Per Board policy 412 Travel and Expense Reimbursement, mileage will be reimbursed using the current established IRS rate as a guide. As of January 1, 2020, the reimbursement rate is \$0.575 per mile.

- Mileage reimbursements are paid on the 15th and 30th of each month via direct deposit through the payroll system.
- Mileage reimbursement requests must be submitted within sixty (60) days of the last day of the month in which the reimbursable mileage occurred. Reimbursement requests submitted after sixty (60) days are subject to tax withholding per IRS rules.
- Dates should reflect when miles were actually driven - not when request is submitted.
- A notice will be sent out when mileage rates change.
- When multiple employees are attending the same event, they are expected to car pool when reasonable and/or use a district vehicle.

Airfare

The actual cost of airfare for pre-approved conferences may be reimbursed under the following guidelines:

- Maximum reimbursement shall be single coach airfare, including required fees.
- Reimbursement shall be for the most direct route.
- Reimbursement shall be for the traveling employee only.
- Optional seat selection related fees shall not be reimbursable.
- Fees for up to two checked personal baggage shall be reimbursable.

Miscellaneous Travel Expenses

Relevant and necessary taxi fees, parking fees, tolls, and/or airport shuttle fees may be reimbursed. Rental car costs may be reimbursed only if specifically pre-approved by the Superintendent or Business Manager.

Meals

For pre-approved conferences, trainings, and special events, various meals are generally reimbursable. The actual cost of each employee meal, inclusive of tips, may be reimbursed up to the following per meal limitations:

- Breakfast: \$8
- Lunch: \$10
- Dinner: \$20

General reimbursement guidelines are as follows:

- Meal limits may not be combined.
- Breakfast may be reimbursed if travel is required before 6:00 am and breakfast is otherwise not provided.
- Dinner may be reimbursed if travel is required after 8:00 pm and dinner is not otherwise provided.
- If a respective meal is included with the registration fee, a substitute meal will not be reimbursed.
- **Itemized** receipts are required for reimbursement.
- Tips in excess of 15% may not be reimbursed.
- Purchases of alcoholic beverages will **not** be reimbursed, and receipts should **not** reflect any such purchases.
- Exceptions may be made at the discretion of the Superintendent or Business Manager prior to the event

Overnight Travel

Employees traveling overnight have these additional guidelines:

- Breakfast will not be reimbursed if the lodging includes a free breakfast.
- For out-of-state conferences, dinner the evening before the conference and breakfast the day after the conference may be reimbursed.

Same Day Travel

Employees traveling for a single day have these additional guidelines:

- Lunch is not eligible reimbursement
 - Exceptions may be made at the discretion of the Superintendent or Business Manager prior to the event.
- Reimbursement requests are subject to tax withholding per IRS rules.

Extracurricular Bus Drivers

When the need arises to purchase a meal from a concession stand, first ask for a receipt. If one is not available, the following needs to be listed on a reimbursement request:

- Location of Concession (ex. Ordean Field Concessions)
- Items purchased
- Total amount paid
- Date of purchase
- Time of purchase

Other Reimbursements

Tuition Reimbursement

Employees who are contractually eligible to receive tuition reimbursement may submit to receive reimbursement, as follows:

- Pre-approval by both the employee's supervisor and Superintendent is required.
- Proof of courses and payment are required for reimbursement.
- Complete an "Expense Claim Form" (which can be found on the web under HR Staff).
- Submit approved form with receipts to District Office for payment approval.
- Consult the specific employment contract for additional details.

Other

Any reimbursements not already specifically covered by the Employee Travel & Reimbursement Guide, may be reimbursed under the following conditions:

- Purchases must be pre-approved by the employee's principal or supervisor.
- Itemized receipts are required for reimbursement.
- Sales tax will not be reimbursed.
- Complete an "Expense Claim Form" (which can be found on the web under HR Staff).
- Submit approved form with receipts to Payroll for payment.
- Acceptable use of Pcards with proper pre-approval is highly encouraged.