

# Student Travel

## School Board Policy DEE Local states

Each District employee who is authorized to travel assumes, with the acceptance of that authorization, a direct responsibility to limit travel claims to those actually incurred on travel that is clearly for the purpose of discharging essential official business of the District. Planning of day-to-day travel should take into consideration the most economical means of accomplishing the authorized mission.

Administrators who are responsible for making travel arrangements and for approving travel plans have the additional responsibility of limiting travel plans to those trips that are clearly in accordance with Board policy, the District improvement plan, or official Board action.

Travel expenses and reimbursement for travel expenses must be made in accordance with the Travel section of the Finance Manual.

## Federal Guidelines (EDGAR)

All travel expenses paid with grant funds shall meet the new EDGAR requirements (200.474) such as: 1) all travel costs must be reasonable and necessary; 2) all travel costs must be consistent with the district's travel policy; 3) all travel costs must be directly related to the grant award; and 4) all travel costs must meet the obligation of expenses rules.

## Student Travel Overview

In general, "Travel" is defined as Travel both inside and outside of the District boundaries where employee and/or students are acting as a representative of the District. In this case, the District may reimburse employees for some or all of qualified expenses. The District does not pay Travel expenses for spouses, Non-District employees, or other related guests.

A Travel Request for Approval (hereafter referred to as a "Requisition/Travel Request") must be submitted and approved through the Travel Approval process **prior** to an event. All Travel Request are approved electronically via the eFinance Plus Requisition process, which is submitted by the campus/department budget secretary. The required and completed Sponsor/Student Travel Request Form and Travel Acknowledgment Form must be attached to the requisition and should be prepared **15 days prior to the departure date** to allow time to obtain all required levels of approvals and processing, which include the Principal/Director on the campus/department and corresponding Assistant Superintendent. The Travel Request is not considered approved until the employee receives the Travel Approval PO via email.

All Registrations, Hotel expenses, and Transportation costs are to be paid to the appropriate Vendors by separate Purchase Orders and are only to be entered after the Requisition/Travel Request is approved and converted to a Purchase Order. On subsequent Requisitions related to the travel, the initial Travel Purchase Order Number will need to be referenced on the comments line (Example – "TPO#42XXXXXXX"). Attach required back up documents (reservations, registration fee, etc.) to the requisition. See sections on Registrations and Hotels.

### **Booster Club and Activity Fund**

To ensure the safety and accountability of CISD Students, all school sponsored events that require travel of CISD Students must have a Requisition/Travel Request approved through the Travel Approval process and be converted to a Purchase Order.

### **Student/Sponsor Travel Requisitions must include the following**

- Student/Sponsor Travel Request Form
- Event Documentation (conference flyer, agenda, registration form, etc.)
- Travel Acknowledgment Form for Sponsor
- Student Roster

## Meals – Student Travel

- Meal per diem rates (not including tips) are advanced prior to the trip for the cost of obtaining food.
- Employees/Sponsors traveling with students are eligible for meal advances for overnight trips.
- Meal allowances are paid according to the following rate and schedule:

To Be Eligible For	Rate		Must Depart Before	Must Return After
	Sponsor	Student		
Breakfast	\$12.00	\$10.00	7:00 AM	8:00 AM
Lunch	\$12.00	\$10.00	11:00 AM	1:00 PM
Dinner	\$12.00	\$10.00	5:00 PM	7:00 PM

**A meal expense is defined as consumable food or non-alcoholic beverages and does not include the purchase of tableware and miscellaneous dining supplies**

- Meals will be advanced for Sponsors and Students for student travel only via the initial Requisition/Travel request.
- **Funds are deposited electronically into the Sponsor's bank account.**
- The District will not reimburse tips or gratuity.
- Meal money issued to Sponsors and Students must be documented on the Monies Disbursed to Students/Sponsors form. All payees must sign for the amount of funds they received. The form should accompany the Travel Recap form after the return from the trip.
- **Any unused meal money must be returned to the District.**
- **Group Meals** – In instances where meals are purchased in a single transaction for the entire group, a receipt must be provided detailing the expense of food and beverage only with the Travel Recap. Group meals should not exceed the student/sponsor per diem rate. Any unused meal money must be returned to CISD.
  - **Example:**
    - 5 students x \$10.00 per diem advanced = \$50
    - Pizza and beverages for the group = \$30
    - Money returned to CISD = \$20

## Lodging – Student Travel

- When Student travel requires a hotel stay, every effort should be made to obtain the most economical and practical accommodations available considering the purpose of the event.
- When the travel event is less than 50 miles from the campus/department, overnight travel is not allowed; therefore, lodging will not be paid.
- Prior to a Requisition being entered for lodging, the Event/Trip must be approved using the Requisition/Travel Request process.
- Hotel Confirmation / Documentation should be attached to the requisition and include room amount per night and tax amount. The Original Detail Hotel Bill or Invoice/Receipt must be furnished after the trip. The Hotel Bill should clearly indicate the cost assigned to the “In-Charge/District Representative” and the cost assigned to the Students or Bus Driver, where applicable. The Sponsor is responsible for ensuring payment of the hotel bill either by employee reimbursement via Travel Recap form or district funds (contact Travel Department).
- Hotel/Lodging Requisition must include the following –
  - Confirmation documentation from hotel that shows hotel address
  - Dates of stay
  - Room amounts per night
  - Tax
  - Remit information
  - Who: Group/Department Attending, Number of Attendees, and Employee/Student Roster
  - Confirm hotel will accept a District Check
- **Texas Hotel Occupancy Tax** and **Texas State Sales Tax** will not be paid. The District is exempt from this tax. The Texas Sale and Use Tax Exemption Certificate and Texas Hotel Occupancy Tax Exemption Certificate are located on the Conroe ISD Travel Website. It is the Sponsor’s responsibility to present a Hotel Tax Exemption Certificate to ensure that taxes are not charged. The District is not exempt from City, county, tourism, etc. taxes. The District will pay State sales tax on out-of-State Travel.
- To avoid cancellation fees, the Sponsor is responsible for notifying the Hotel prior to the cancellation deadline. If the Hotel is not notified by the required deadline, the Employee may be required to pay any fees assessed by the Hotel.



- Lodging will be paid based on the following:
  - Students = 4 per room/separate rooms for males and females.
  - Adults = 2 per room/separate rooms for males and females.
  - Supervisor/Principal/Director = 1 room.
  - HS Campus Athletic Coordinator = 1 room.
- The District will not reimburse hotel charges for internet connection fees unless the staff member receives prior approval from their supervisor. Approval should be attached to the Requisition/Travel Request.
- The District will not provide reimbursement for in-room movies, room service, laundry, phone calls, incidentals or alcoholic beverages.
- Travel websites and vacation rentals such as Hotels.com, Expedia, Travelocity, Airbnb, etc. shall not be used to make hotel accommodations due to the inability to provide an itemized hotel receipt suitable for reimbursement.
- An itemized receipt/invoice must accompany your Travel Recap within 5 business days of the return from the trip or event. **Review the receipt/invoice for accuracy at checkout.** The District will not reimburse tax or rates that are different from initial approval.

## Transportation – Student Travel

- Transportation in the form of a Charter Buses or Vehicle Rentals may be required for Student Travel. The Requisition/Travel Request must be approved and converted to a Purchase Order prior to requesting a vehicle. See Shopping A-Z > Vehicle Rentals for instructions.
  - **Charter Buses** require an approved Purchase Order and can no longer be paid with Activity Fund check. Detailed instructions on securing a charter bus is provided on the Travel and Purchasing websites.
  - **Vehicle Rentals** require an approved Purchase Order and can no longer be paid with an Activity Fund check. Detailed instructions on securing a rental vehicle is provided on the Travel and Purchasing websites. Fuel receipts can be submitted for reimbursement. To avoid higher fuel rates charged by the rental company, the Sponsor should refuel the vehicle **before** to returning the vehicle. If additional fuel is charged by the rental company, the District will only reimburse the national average gas price for that region.

- **CISD Bus Transportation** can be requested via the Bus Hive, located on the SSO Portal. If additional fuel is purchased while in possession of the CISD Bus, request for reimbursements are made through CISD Transportation.
- **Parking** charges are allowable travel expenses when traveling in a rental car, personal vehicle, or district owned vehicle. The District will reimburse for valet parking only if self-parking is not available. The District will not provide reimbursement for taxes for in-state parking.
- **Tolls** are not an allowable expense and will not be reimbursed. Fines resulting from unpaid tolls will be the responsibility of the Sponsor.
- **Uber, Lyft, Tax, Shuttle, etc.** – Taxi, shuttle and ride share expenses are allowable for reimbursement at the exact cost with itemized receipts. Tips may be paid at the sponsor's discretion but will not be an allowable travel expense for reimbursement or payment with district funds. The District will not provide reimbursement for taxes related to transportation cost while in-state. Out-of-state transportation taxes are reimbursable.
- **Air Travel** – Sponsors and Students traveling out-of-state are eligible for air transportation and must use the State Travel Contract for air accommodations. Detailed instructions are provided on the Travel and Purchasing Website.

## Registration – Student Travel

- Registrations are to be paid to the appropriate vendor by Purchase Order only once the original requisition/Travel Request has been approved and converted into a Purchase Order.
- **No Registration payments are made to an employee.**
- Sponsors must present an invoice brochure, flyer, registration or completed entry form to be attached to the requisition. Documentation must show details with the name of person registered (if applicable), location, date and time of the event, and any meals or other expenses that are provided.
- Registrations are paid in advance of the event and are sent directly to the Vendor.
- Purchase Orders should be prepared in advance and with regard to the registration deadlines. No registration can be processed until all required documents are attached to the Requisition.

- When entering the requisition for registrations, the description should include the following:
  - Who: Group/Department attending, number of attendees, employee names
  - What: Name of the Event
  - When: Date of the Event
  - Where: Location of Event
  - Registration Amount
  - Remit Information

## One-Day Trips – Student Travel

- Trips in which Students leave and return in the same day are considered **One-Day Trips**.
- Travel must be approved prior to the event by completing the Requisition/Travel Request process in eFinance Plus.
- Meals for Sponsor and Student Travel (if allowable based on examples below) will be advanced on One Day Trips at the District per diem rate.
- Meals on one day trips will only be paid if the travel/meal occurs outside of the employee's normal work hours (i.e. evening or weekend travel).
- According to the IRS, reimbursement or advances for meal expenses when the travel event is not overnight or when the employee is within their normal work schedule, is considered a fringe benefit and is taxable income that must be reported on Form W-2.

## One-Day Trips – Meal Examples

- Example 1: The baseball coach is traveling with students to a playoff game in Bryan on a Friday night. They plan to leave the school at 3:00 pm and return at 11:30 pm that same night. Because the event is outside of normal work hours the coach can receive meal money for his/her dinner.
- Example 2: The cross-country coach is traveling with students on a Thursday to a cross country meet in Rosenberg. They plan to leave the school at 8 am and return at 5 pm the same day. Because the event is taking place during normal work hours the coach would not receive meal money for his/her lunch.
- Example 3: The orchestra director is traveling with students on a Saturday to a UIL competition. They plan to leave the school at 8 am Saturday morning and return at 5 pm



the same day. Because the event is taking place on a Saturday which is outside of normal work hours the orchestra director can receive meal money for his/her lunch.

- Example 4: An employee from the admin building is attending an all-day meeting at Region IV on a Monday. They plan to leave the admin building at 8:00 am and return at 4:00 that same day. Because the event is taking place during normal work hours the employee would not receive meal money for his/her lunch.
- All expenses related to One Day Trips must go through the Travel Recap process.

## Above District – Student Travel

- Above District Travel may be approved for certain competitive events.
- Above District Travel is defined as having a local qualifying event or competition followed by a regional qualifying event.
- Receiving awards, recognition, performing, or making presentations at a State or National Conference would not be considered Above District.
- Competitions are invented and developed annually. Newly added competitions will be evaluated after a three-year period to determine if they should be included.
- Above District Funds **cannot** be used to stay overnight in Houston unless approved by the Assistant Superintendent.

- The following currently qualify as Above District
  - All post-District UIL Athletics (not National).
  - All post-District UIL Fine Arts and Academic meet events (including Speech and Drama) (not National).
  - All NFL (post-qualifying level).
  - All post local Vocational Contests affiliated with the official organization (i.e. VICA, HOSA, etc.).
  - Science Fair (post-local).
  - DI (post-local).
  - Individual TMEA Region and All-State (post-local) (not National or exhibition performances).
  - BEST Robotics (post-local).
- The following currently are not included for Above District
  - Dance
  - Cheerleading
  - Club Sports
  - Bands of America
  - JROTC
  - UIL Athletics and Fine Arts Above District competitions will not be approved above the State level.
- District Policy states that an Above District event is one for which Students must qualify. Above District Funds are in most cases used for playoffs and other competitions after placing in District and a rush to receive these Funds is necessary.
- The building Principal will decide the number of Coaches, Directors and Staff who can be absent from instruction.
- Funds will include ONLY those Students who are involved in competition plus alternates. Students should not be excused from class to attend an event when they are not competing (or an alternate).
- **Team Sport** Coaches who may attend are the Head Coach of the **Individual Sport** and two Assistant Coaches. If other Coaches are approved to attend by the Campus Principal, those expenses will need to be paid for with Campus Funds.
- **Individual Sport** Coaches who may attend are the Head Coach of the **Individual Sport** and two Assistant Coaches. If other Coaches are approved to attend by the Campus Principal, those expenses will need to be paid for with Campus Funds.

- Fine Arts Directors attending TMEA Honor Organizations, All State Competition, or State Solo and Ensemble are limited to one Director per 10 Students unless there is a mix of male and female Students. In that case, there would be one male Director and one female Director approved with Above District Funds.
- Groups invited to perform at specific in-State events would need special permission to request Above District Funds. Examples: National Middle School Association Conference in Houston, Fine Arts Education Day at the State Capitol in Austin.

## Travel Recaps – Student Travel

- The Travel Recap Form must be completed and sent to the Travel Department within **five (5) business days after the trip.**
- Failure to submit Recap may result in the denial of future travel for the employee and/or Campus/Department.
- Recaps for multiple Employees should not be combined. Separate Recaps must be submitted per Employee per Travel Purchase Order. Recap forms should not be handwritten.
- Supporting documentation should include:
  - Original detailed/itemized hotel receipt.
  - Verification of miles from MapQuest for mileage reimbursements.
  - Parking receipts.
  - Gas receipts for rental vehicles.
  - Tabulation of Monies Disbursed to Students/Sponsors form, if applicable.
- Do not send cash through inter-office mail. Repayment of funds in the form of cash must be delivered to the Purchasing Department and a cash receipt will be provided after verification of the funds.
- Recap forms should not be handwritten.
- The original Travel Purchase Order number for the Employee Travel, Lodging/Hotel, and Transportation must be indicated on the Travel Recap form where specified. The Recap cannot be processed without the required PO#'s.
- The Travel Recap Form must be signed by the Employee/Sponsor as well as their Supervisor/Principal/Director, dated and returned to the Travel Department regardless if reimbursement is requested.

- A “Request for Recap” will be sent to the Employee/Sponsor for any Travel not recapped. If no response is returned, the Employee/Sponsor Vendor status will be placed on HOLD. The Supervisor/Principal/Director will be notified. No funds can then be disbursed to Employee/Sponsor.

## District Non-Allowable Travel Expenses

- Travel arrangements or reimbursements for non-Conroe ISD employees (including spouse and/or dependent children, non-District employees, or related guest)
- Alcoholic drinks or beverages.
- Hotel room service
- Entertainment expenses, such as in-room movies, fee-based hotel amenities such as gyms, spas, etc.
- Expenses due to the traveler’s failure to cancel a registration or travel arrangements (except for extenuating circumstances).
- Early Bird boarding or fees paid for boarding/seating upgrades.
- Hotel internet charges (unless expense is work-related and pre-approved on travel Requisition/Travel Request)
- Travel expenses incurred after an employee terminates employment with the District

## Travel Tips

- Plan ahead.
- All Purchase Orders should be prepared in advance and with regard to the deadlines.
- No requisitions can be processed until all required back up documents are attached to the Requisition.
- Contact the Travel Department for assistance with unique and special travel situations if you are unsure of the proper procedure.