

La Villa ISD

PROCEDURES: TRAVEL CHECKLIST

To ensure compliance with this Board Policy, the following checklist has been developed to aid the traveler. In addition, training for travelers shall be provided on an annual basis during face-to-face training sessions or by providing training resources on the district's website.

Traveler Checklist:

Preparation:

- Obtain Travel Authorization
- Review Travel Guidelines
- Obtain copy of training/conference brochure to verify the registration fee and **deadline(s)**
 - **Travelers may be held personally liable for late registration charges.**
- Verify that funds exist in your campus and/or department budget

Before the Trip (as applicable):

- Submit a request for use of a district vehicle
- Submit the preferred flight information and estimated charges
- Submit a completed copy of the travel event registration form and Schedule of Events.
- Submit a copy of the hotel reservation confirmation with the estimated charges
- Submit a copy of the rental car reservation confirmation with the estimated charges (including fuel)
- Submit documentation for anticipated taxi and/or shuttle costs
- Submit the Meal Calculation worksheet for anticipated meal per diems
- Submit a Mapquest/Google Map printout with the anticipated total miles to be driven to/from the travel event
- Submit a Travel Authorization/Settlement form to your supervisor, as applicable. **(Campus secretaries shall complete for campus-based travelers, except for the traveler's signature.)**
 - All overnight trips for staff and/or students require a Travel Authorization form
 - Non-overnight trips for students that include a request for meal per diems require a Travel Authorization form.
- Campus secretaries shall complete for campus-based travelers.**
 - A separate requisition is required for each vendor. For example, if a traveler's anticipated expenses include a flight (paid by Amex), registration (payable to TECA), lodging (payable to Amex), and meals (payable to the traveler),
 - Registration, flight, and lodging requisitions may be submitted for multiple travelers attending the same event. The name of each traveler must appear on the requisition.
 - All requisitions must reflect the event, city of travel, date(s) of travel, traveler(s) and budget code(s).
 - Supervisors should sign the form and forward to the Superintendent for final approval.
 - After Superintendent approval, the original form shall be approved by the Business Manager and processed by the Account for payment of a travel advance.

Note: All Pre-Trip activities must be completed before a check/PO can be issued by the Business Office. Please plan ahead to ensure that all deadlines are met.

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After the Trip (as applicable):

- Complete and submit a Travel Settlement form **within 10 days of the trip**
 - Attach receipts for all transportation (taxis, shuttles, rental cars, etc)
 - Attach the hotel receipt (Occupancy taxes for Texas hotels will not be reimbursed)
 - Attach registration receipt, if provided
 - Attach parking receipts, if any
 - Travel expenditures shall not exceed the district travel rates
 - Supervisors should review and sign the Travel Settlement form and forward with all supporting receipts to the Business Office for verification and approval to ensure that the traveler complied with the district travel guidelines prior to approval of the Travel Settlement form.

ENJOY YOUR TRIP!!!