BUSINESS TRAVEL PROCEDURES

ATTENDING WORKSHOPS/CONFERENCES OR TRAININGS

To attend a workshop, conference or any training the following steps must be completed. ALL FORMS ARE LOCATED ON OUR WEBSITE: thebrazosschool.org under Human Resources, Employee Forms, Travel and Reimbursement & Purchase Orders.

REQUEST FOR TRAVEL:

Prior to any travel, fill out both a Business Travel Form and a Travel Request. The Business Travel Form is for Human Resources purposes for verification of an excused absence from the campus. The Travel Request is for the pre-approval of any expenses that might incur related to the travel (i.e. mileage, meals, lodging, rental car, fuel, etc.).

PURCHASE ORDER:

A separate Purchase Order must be completed and approved for the cost associated with the class/workshop and/or rental car. A Purchase Order must be completed and approved prior to an individual being able to complete the class/workshop registration. A Purchase Order number cannot be assigned for any purchase or expense until the Superintendent, Dr. Katy Greenwood, has reviewed and granted approval. A Purchase Order number is required during the registration process. If a rental car is being utilized, the individual must coordinate with their campus office staff for the reservation of the vehicle.

CREDIT CARD USE REQUEST:

A school credit card will be issued for business travel purposes in the event a rental car is being utilized for the purchase of fuel, to pay for lodging on overnight trips, and/or if payment for the class is required on the day of the event. If a school credit card is required a Credit Card Use Request must be completed prior to travelling. If the credit card assigned to the campus office is not available then a credit card will be issued by the District Office, Lindsay Halliwell. All receipts must be turned in immediately with the credit card upon your return from travelling.

TAX EXEMPT FORMS:

The Brazos School for Inquiry & Creativity is tax exempt. If a school credit card is issued, you must use a Tax Exempt form for all purchases. Copies of the Tax Exempt form may be obtained from your campus office staff and/or the District office staff.

REGISTRATION FOR CLASS/WORKSHOP:

Each individual is responsible for completing their own registration of any class/workshop. Neither the campus office staff nor the District office staff will be able to register any person for an event. Each person must create an account with the sponsoring entity (i.e. Regional Service Centers, Region IV, Region VI, etc.) to complete any and all registrations. This entity will e-mail the Certificate of Completion to the individual’s e-mail that is provided on their account.

CERTIFICATE OR VALIDATION OF ATTENDING:

After returning from your class/workshop you must send a copy of your Certificate and/or other documentation with proof that you attended the class/workshop to the Human Resources Department, Sheila Galloway. The majority of the time the sponsoring entity issues certificates after the class or through e-mail. If not you will need some form of proof that you attended the event.

REIMBURSEMENT OF TRAVEL:
Upon your return from your travel you will need to complete a Reimbursement of Travel form. All current reimbursement rates are listed on the Reimbursement of Travel form. To be reimbursed for mileage a printout from Google Maps (or equivalent) must be attached. For reimbursement of any related expenses (i.e. meals, etc.) the receipt(s) must be taped, not stapled, to blank paper and attached. Fuel costs are not reimbursed for personal vehicles, and a school credit card must be used for fuel for rental vehicles. Any taxes and/or tips an individual paid will be not be reimbursed. For meals, and/or lodging, BSIC will only reimburse up to the maximum allowable amount as established by TEA. Reimbursements for travel must be completed and submitted to the employee's supervisor. Reimbursement must be requested within five (5) working days after the employee's return from travel.

Once the District office receives the request for reimbursement and it has been reviewed and approved, a check will be issued to the individual. Checks are processed for payments twice a month, approximately the 1st and the 15th of each month. For the Bryan employees, you will be notified by a note in your employee box located in the campus office that you have a check to be picked up from the District Office, Sheila Galloway or Lindsay Halliwell. For the Houston employees, the check will be mailed to the address on file with the Human Resources Department, Sheila Galloway.

At times you may need to be paid expenses before you attend a workshop/conference/training, depending on the length of stay along with how far you will have to travel – please talk to your principal and notify the district office of your needs so it can be worked out at least 2 weeks prior to your scheduled travel date(s).

*The guidelines for business travel are located in the Personnel Handbook 2018-2019 under Part 4: Compensation and Pay Schedules, Expense and Travel Expense Reimbursement, pages 36-37.

2018-2019 PERSONNEL HANDBOOK

PART 4: COMPENSATION AND PAY SCHEDULES

Pages 36 & 37

Expense and Travel Expense Reimbursement

Prior to an employee incurring travel expenses related to BSIC business, the employee must submit a Request for Authorization to Travel Form as well as a Business Travel Form to their Principal or supervisor for approval. Once approval is obtained, the employee must submit the forms to the District Office.

For approved travel, employees will be reimbursed for mileage and travel expenditures according to the current rate schedule authorized by the Board of Directors. Employees will not be reimbursed for travel to and from the workplace.

Transportation: The District Office will determine if a rental car or mileage for use of an employee's personal vehicle will be the most efficient use of school funds.

Lodging: The District Office will coordinate the lodging requirements for all travel, making sure tax exempt forms are used when applicable. Employees may request a preference for lodging, but the final decision on lodging will be made by the District Office. Requests for pet, smoke free, or handicap accommodations should be made at the time of travel and indicated on the Business Travel Form.

Following the completion of travel, all expenses must be itemized and detailed on the Reimbursement of Approved Travel Form. To be reimbursed, all original itemized receipts for travel expenses must be included with the Reimbursement of Approved Travel Form and submitted to the employee's supervisor. Reimbursement must be requested within five (5) working days after the employee's return from travel.

Occasionally, an employee, with prior approval, may incur personal expenses on behalf of the BSIC. Requests for reimbursement of such expenses must be made within one (1) month from the date the expense was incurred.