



Purchasing Department Travel Policy & Procedure Guidelines

Wylie ISD Purchasing Department Travel Policy & Procedure Guidelines

Table of Contents

Introduction	3
Non-reimbursable Travel Expenses	3
Travel Authorization	3
ARTA Travel	4
Booking Travel	4
Overnight Travel	5
Travel Advance	5
Lodging	5
Employee Meal Allowance	6
Transportation.....	6
Parking Costs.....	7
Flights	7
Airline Vouchers	7
Out of State Travel.....	7
Local Conference/Workshops	8
In-District Travel.....	8
Monthly Mileage	8
Federally Funded Travel	8
Board Member Travel	9
Travel Reconciliation.....	9
Student Travel	9
Student Meal Allowance	9
Motor Coaches	10
Field Trips.....	10
Conference Housing	10
Travel Frequently Asked Questions	11

Introduction

Each District employee authorized to travel for school business assumes a direct responsibility to limit travel claims to those actually incurred while traveling and representing Wylie ISD. Likewise, each employee has a responsibility to limit travel to purposes that are clearly essential. Arrangements utilizing the most economical means of accomplishing the authorized travel *must* be considered. This planning should include consideration of the use of their personal car or common carrier, sharing rides with other employees attending the same event, and similar alternatives when appropriate.

Please note the following:

- **DISTRICT CREDIT CARDS ARE FOR TRAVEL ONLY**
- **THEY CANNOT BE USED TO CIRCUMVENT THE PO PROCESS**
- **THEY CANNOT BE USED FOR SPECIAL MEALS/REFRESHMENTS ie: after school meeting or school tutoring**

Non-reimbursable Travel Expenses

The following travel expenses are not reimbursable:

1. travel to participate in meetings of civic or social associations; ie: Rotary Club, Lions Club, etc.;
2. travel to meetings of professional organizations unless approved by the District;
3. tours or other entertainment while on business travel;
4. hotel room movie rentals, room service, alcoholic beverages, expenses charged to the hotel room and expenses incurred by a spouse;
5. no upgrades on rooms, seats, flights or early bird check ins;
6. travel incurred during an employee's vacation period unless it occurs during a school related conference or workshop;
7. per diem while on local travel.

Travel Authorization

A signature of approval shall be secured by employees for professional out-of-town, overnight meetings and conferences on the *Request to Travel Form* prior to the trip being made or prior to a request for an advance being submitted. Once completed, the form is to be scanned to your campus/department secretary to be attached to the required travel PO's.

No personal charges incurred due to last minute changes to travel accommodations and/or plans will be reimbursed unless the changes are deemed reasonable and/or necessary (i.e. personal or family emergency).

In accordance with the State Comptroller's TexTravel Guidelines, the District acknowledges that discount or reward programs, such as frequent flyer miles or hotel reward points are not things of value belonging to the District. The administrative burden to track the individual reward programs of employees would be administratively impractical and thus the District has determined that the employees may retain the value, if any that they receive personally due to school business related travel.

ARTA Travel

ARTA Travel is WISD's Corporate Travel Agency and the preferred method of making travel arrangements however, those that have a WISD issued credit card may book their own travel.

If any travel including registration, hotel and/or airfare is booked using your personal credit card, you will get reimbursed **AFTER** the trip with appropriate receipts.

Please Note: If you use ARTA to book travel, it MUST be for the entire trip.

Wylie ISD's designated ARTA Travel Agent:

Vickie Christine

wylieisd@artatravel.com

972-735-8043 Direct

214-733-1970 Cell/Text

Booking with ARTA Travel

Campus/Department secretary will email ARTA Travel at wylieisd@artatravel.com to request reservations. **A SIGNED REQUEST TO TRAVEL MUST ACCOMPANY RESERVATION REQUEST** to ARTA Travel.

Be sure to include all pertinent information in the email to ARTA Travel:

- preferred hotel
- check in/check out date
- number of rooms (provide names of traveler(s))
- traveler(s) cell phone number(s)
- king room or 2 double beds
- campus/department ghost card to charge the ARTA fee to
- rental car reservation (if applicable)
 - ARTA Travel will make reservations but PO will be to EAN Holdings
- airfare reservations (if applicable) must have:
 - traveler(s) full name as shown on their driver's license and date of birth

ARTA Travel will send an e-invoice with hotel/airfare information to the traveler and the Campus/Department secretary. A requisition must be submitted for the following if applicable:

- Blanket PO to Bank of America (ARTA Travel will charge the campus virtual card they have on file) for hotel and airfare **Include ARTA Travel fee as a separate line item**
- PO or Check Request to vendor for conference registration
- PO will be to EAN Holdings for car rental
- Check request/ACH to employee for per diem

Campus/Department secretary will attach all appropriate back up (completed and signed Request to Travel, conference backup, google map for mileage reimbursement, etc) to the appropriate requisitions for the Travel Specialist to review and process.

Overnight Travel

For overnight travel, our Corporate Travel Agency ARTA Travel, will handle the following services:

- Airfare
- Lodging (paid via direct bill)
- Rental Car - Separate PO to Enterprise (EAN HOLDINGS) is required
- Charter Bus (if applicable)

Travel Advance

When requesting an advance for travel, the approved and signed ***Request to Travel Form*** along with all the back-up needs to be emailed to *your* Campus/Department Secretary **at least two weeks before funds are needed.**

Backup to include:

- Completed registration form along with agenda of conference
- When traveling with students, a list of names is required along with the breakdown of their per diem. Please see the student per diem rate section.

Employee Travel advances will be issued via **ACH** for the following:

- Meal Per Diem (excluding federally funded trips)
- Mileage (Private/Personal Transportation)

Student per diem will be issued as a paper check to the sponsor/teacher and returned to the secretary for issuance.

Lodging

The District only allows overnight lodging for travel that occurs **50 miles** or more from Wylie ISD. This means the location of the event, not the location of the hotel. Special consideration *may be taken* for events that are less than 50 miles, scheduled to end after 9pm *and* begin again the following day by 8 am. Send event schedule and lodging request to travel@wylieisd.net for review.

The District will pay for the actual cost of lodging and parking.

Public Schools are required to pay city/county taxes. Not all hotels will accept the tax exempt form when individuals pay for the hotel.

The single room rate will apply unless shared by another employee.

Hotel rates vary and every effort should be made to obtain the most economical and practical (i.e. sharing rooms when appropriate) accommodations available considering the purpose of the meeting/conference. Upon arrival, the traveler should verify the rate shown on the itinerary is the rate they are charged.

Each employee is required to obtain a Hotel Occupancy Tax Exempt form from the Campus/Department secretary to be used while traveling. It is also recommended that the employee take a Sales Tax Exempt form due to the fact that some hotels will charge sales tax for parking. Please note hotels are *not required* to accept a tax exempt form for parking.

If reservations need to be cancelled, contact ARTA Travel and the Travel Specialist immediately so that the cancellation is done properly. Notify the Travel Specialist of the cancellation as well. The District will not reimburse an employee for expenses incurred as a result of not cancelling a reservation.

Please note: All hotel reservations must be made in the WISD employee's name only. Spouse, other family members and/or friends are not allowed. Online booking websites are not allowed.

Employee Meal Allowances

For overnight travel and on school business, employees *only* will be eligible for meal allowances. The per diem rate for meals will not exceed the approved daily rate of \$42.00.

Meal per diem is as follows:

Breakfast - \$9.00 (leave before 8:00 a.m.)

Lunch - \$15.00 (leave before 12:00 noon or return after 1:00 p.m.)

Dinner - \$18.00 (leave before 5:00 p.m. or return after 6:00 pm.)

Any special meetings, banquets, etc., requiring more than the maximum allowance for meals shall require prior approval from the Superintendent or his/her designee unless the meal is part of the registration fee.

The Campus/Department Secretary will enter a requisition to the traveler in Skyward along with *Request to Travel* form prior to the trip in order for employee to receive per diem in advance.

Tips can be given if warranted and are to be of a reasonable amount. Tips up to 20% will be reimbursed. Any tip over 20% will be at the expense of the traveler.

Transportation

Out of pocket expenses associated with public transportation such as taxicabs, uber, shuttles and parking will be reimbursed **after** travel. Receipts for these expenses must be attached to the requisition in Skyward along with the Travel Reconciliation form for reimbursement **within five (5) business days after the trip**.

Those that have a WISD issued credit card may pay for public transportation such as taxicabs, uber, shuttles and parking with the credit card. Be sure to obtain receipts to be turned in along with the Travel Reconciliation form.

Travel by personally-owned private vehicle outside the District shall be advanced at the rate approved at the beginning of each fiscal year.

Mileage allowances will be based on Google Maps. The current rate is **.54 cents per mile**.

When two or more employees of the District with the same itinerary are traveling, mileage reimbursement shall be claimed and allowed for only one of the employees. In other words, everyone can drive but only one person will be reimbursed.

The Campus/Department Secretary will enter a requisition to the traveler in Skyward and submit *Request to Travel Form* along with the Google Maps print-out from their WISD campus to Conference/Meeting destination prior to the trip in order for the traveler to receive payment for mileage.

Employees should travel to their destination location by the most economical means, ie: either flight or mileage however, employees may opt to travel to their event destination via district/personal vehicle in lieu of flying to the event for medical or personal comfort reasons. If the traveler opts to travel to an out of state destination, the costs/reimbursement of transportation shall be limited to the lesser of the mileage or estimated flight cost.

Parking Costs

If an employee pays for public or valet parking out of pocket he/she will be reimbursed **after** the trip via ACH deposit. Receipts **MUST** be included with the Travel Reconciliation form **within five (5) business days after the trip**.

To be exempt from sales tax for parking, a sales tax exemption form is required even at most hotels.

****Please note that the Sales Tax Exemption form and the Hotel Occupancy Tax Exemption form are two different forms.**** FYI, hotels are not required to accept a tax exempt form for parking.

If parking at a facility paid thru a toll tag, the employee must obtain a receipt from the Toll Authority thru the NTTA website and submit for reimbursement.

Flights

Flight costs are allowable for employee travel to events **200** miles or more.

- Preferred carrier is SWA unless it is more economical to use a different carrier. Travelers on a SWA flight are allowed to check up to two (2) bags, limited to no more than 50 pounds each at no additional charge. Luggage charges for a third (3rd) bag will not be allowable with District funds.
- For all flights other than SWA, luggage charges if any, will be limited to the fees for two (2) bags, up to 50 pounds per bag.
- The actual cost of commercial air transportation (lowest coach fare) to accommodate the required travel dates of the event shall be allowable costs.
- No personal charges incurred due to last minute changes to travel accommodations and/or plans will be reimbursed unless the changes are deemed reasonable and/or necessary ie: personal or family emergency.
- All travel reservations should be made as far in advance as possible to take advantage of the available discounted airfares.

Airline Vouchers

Any voucher received for flight changes are the property of Wylie ISD and will be retained by ARTA. Vouchers may only be redeemed on District-related business travel. They are not for personal use.

Out of State Travel

Those who wish to attend a conference out of state will be required to obtain additional approval from the appropriate Deputy Superintendent, Assistant Superintendent or Executive Director.

- Deputy Superintendent Curriculum & Instructional – Dr. Kim Spicer
- Assistant Superintendent Finance & Operations – Scott Roderick
- Assistant Superintendent Human Resources – Casey Whittle
- Assistant Superintendent Student Services – Scott Winn
- Executive Director – Athletics - Kyle Craighead
- Executive Director – Communications – April Cunningham
- Executive Director – Community Relations – Ian Halperin

Special consideration for out of state employee meal allowance may be taken in accordance to the GSA (General Services Administration) rate for the city/state in which travel occurs. Send event schedule to travel@wylieisd.net for review. All other standard District travel procedures apply to out of state travel.

Local Travel - Conference/Workshops

Local conference and/or workshop registrations are to be made using a Purchase Order or Check Request following the same procedures as overnight conferences. All backup/invoices must be attached to the requisition prior to submitting to the Purchasing Department.

If mileage reimbursement is requested for a local conference or workshop, the *Request to Travel* form needs to be completed. Meal allowances (per diem) are not eligible for local travel.

In-District Travel

In-District travel is defined as personnel traveling for the District at the principal's or director's request and by using personally-owned private vehicle.

Wylie ISD district employees may be reimbursed for authorized and approved travel between school campuses and/or offices.

Approved mileage will be reimbursed at the mileage rate in effect for the fiscal year in which the travel occurs.

Employees may only claim mileage for the distance between the first place of work and subsequent campuses and / or offices.

Employees may **not** claim mileage for the distance between their home and work.

For In-District Travel reimbursement, please refer to the mileage chart and mileage log on the Travel website. Travel other than to school campuses and/or offices, employee must submit a Google Maps showing the miles traveled and agenda or email regarding the workshop/meeting. Travel must be made by the most direct route.

Monthly Mileage

For monthly mileage reimbursement, a check request or blanket purchase order must be entered in Skyward and the employee should complete the In-District Mileage Log with the appropriate signature of approval. The mileage log then scanned to travel@wylieisd.net for payment reconciliation.

All logs for the prior month must be received by the 10th of the month. No exceptions.

Federally Funded Travel

All travel expenses paid with federal grant funds (typically funds 2xx) 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: 4) all travel costs must meet the obligation of expense rules.

In addition, all federally-funded travel expenses must meet the TEA's Current Travel & Mileage Reimbursement Rates (as published in the most recent TEA Correspondence).

Board Member Travel

Expenses involving School Board members while traveling on school business will be reimbursed at actual cost. Receipts are required including meals.

Travel Reconciliation

Each employee traveling is **required** to complete a Travel Reconciliation form **within five (5) business days** upon their return even if reimbursements are not needed. Send the completed Travel Reconciliation form and **ALL receipts**, if applicable, to travel@wylieisd.net. Failure to submit reconciliations may result in revocation of employee travel privileges.

If a receipt cannot be located, the traveler will need to complete a Missing Receipt Form with appropriate signatures. WISD will pay up to \$25 for any missing receipt. Anything over \$25 is the responsibility of the traveler.

If the employee is unable to travel, the District must be reimbursed any money advanced. The money is to be given to the Campus/Department Secretary to deposit into the appropriate account. A copy of the deposit slip and the Travel Reconciliation Form is to be sent to travel@wylieisd.net

If travel needs to be cancelled, contact ARTA Travel immediately to canceled travel plans properly. Please notify the Campus/Department secretary and Travel Specialist of the cancellation as well.

Student Travel

All WISD student travel is to be in compliance with District Policies. No student may travel to represent Wylie ISD unless accompanied by a WISD employee. For accountability purposes, every student must have a student partner assigned to them (buddy system). If a student is traveling singly, two WISD employees are to accompany them.

Students may not be transported in a personal vehicle under any circumstances.

All Travel guidelines for student travel, registration fees, hotel stays and meals using District funds apply. A student incidental card may be checked out, if needed, for baggage and shuttle fees. Please contact the Travel Specialist at travel@wylieisd.net to request a card.

Please refer to the ARTA Travel section of this policy when booking student travel.

Student Meal Allowance

District employees accompanying students on overnight trips must fill out a *Request to Travel* form. Please include the following:

- Completed registration form along with agenda paid via Purchase Order or Check Request
- List of students traveling along with breakdown of their per diem (if applicable)

The per diem rate for meals will not exceed the approved daily rate of \$28.00. Meal per diem will be provided as follows:

Breakfast - \$6.00
Lunch - \$9.00
Dinner - \$13.00

The Campus/Department Secretary will submit a requisition in Skyward to the sponsor/teacher along with a *Student Request to Travel* form **2 weeks prior** to the trip. The Campus/Department secretary will receive a paper check to forward to the sponsor/teacher.

Charter Buses

The District may use charter buses for extracurricular activities with ten or more students. Please check the Awarded Vendor list located on the District's portal under Purchasing – Documents – Public folder or contact ARTA Travel for these services

Field Trips/Chaperone

Prior to scheduling any field trips, be sure to read and follow the guidelines set forth in the Teacher's Field Trip Guidelines [Teacher's Field Trip Guidelines and Forms](#) and Chaperone's Field Trip Guidelines [Chaperone Guidelines](#) located on the Risk Management website under Employee Resources or the Field Trip link located on the Travel website.

For employees that will be a chaperone on any trips, please refer to the District's Employee Handbook.

Due to the nature of many/most field trips, be sure to contact the field trip vendor to confirm if they accept a Purchase Order or if a deposit/check is needed at the time of the event.

****Any exceptions deviating from the Travel Policy will be approved in writing by the Assistant Superintendent of Finance and Business Operations.**

Conference Housing

When a housing authority has a link to a conference registration, you must contact ARTA Travel with the information and the live link for the housing authority. Be sure to provide all the pertinent information:

- check in/check out date
- number of rooms (provide names of traveler(s))
- traveler(s) cell phone number(s)
- king room or 2 double beds
- campus/department ghost card to charge the ARTA fee to

Once the employee has registered you will need to email ARTA Travel the hotel information and they will book the requested reservations.

After hotel reservations are booked, ARTA Travel will send an E-invoice. The Campus/Department secretary will enter a requisition to Bank of America for these hotel expenses.

Frequently Asked Questions

Do I need a Bank of America PO for travel expenses? Yes, you DO need a Bank of America PO to pay for all hotel and parking expenses! If your traveler has a WISD credit card be sure you account for any Uber charges, if applicable.

Do I need to enter a requisition in Skyward for employee per diem/mileage? Yes, you DO need to enter a requisition to the employee for their per diem and mileage. Will need a google map and be sure to consider the mileage as a round trip!

Do I include EAN Holding (Enterprise) on my Bank of America PO? No, you will need a separate PO to EAN Holdings for rental car expense.

Does employee need a completed/signed request to travel form prior to traveling? Yes, every employee traveling needs a completed and signed form. If traveling out of State, additional signatures are necessary from an assistant superintendent or executive director.

Can I stay in a hotel if I travel less than 50 miles? Anyone traveling less than 50 miles is only allowed mileage advancement. No per diem or hotel is allowed. Special consideration may be taken for events that are less than 50 miles, scheduled to end after 9pm and begin again the following day by 8 am. Send event schedule and lodging request to travel@wylieisd.net for review.

Is the employee meal per diem is \$42/day? Yes

Is the student meal per diem is \$28/day? Yes

Can I tip and get reimbursed? Yes, tips must be a reasonable amount and no more than 20%. Tips over 20% will not be reimbursed.

When traveling with a group of students, is a list of names necessary? Yes, you must provide a list of names when students are involved.

If I use a District vehicle, will the mileage be reimbursed? No, if you are not driving your personal vehicle, you will not get reimburse for mileage.

Do I enter a PO to ARTA for their fee? No, you must enter a PO to Bank of America for hotel expenses and the ARTA fee should be a separate line item.

Why is it necessary to complete a Travel Reconciliation? The travel reconciliation completes the trip showing that the employee did indeed travel, it lists the registration, hotel, per diem, mileage and other expenses. It is important to show if WISD owes anything back to the employee for reimbursement. This must be completed and due back to the Travel Specialist no more than **5 days after they return**.

Is a hotel receipt needed? Yes, the hotel receipt will assist in reconciling the Bank of America statement. Ultimately, the traveler is responsible however, if they do not provide a receipt you must inquire with the hotel for one.

If I rent a vehicle, could I request a fuel card? Yes, fuel cards are managed by the transportation department and if available can be checked out through them.

Do I need to present my credit card at the hotel? Only if you made the reservations yourself using either a WISD issued card or personal credit card. Otherwise, let the hotel know that **your stay was booked using a corporate credit card through our travel agency ARTA Travel**.