MCKINNEY ISD TRAVEL GUIDELINES

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COMPLETING AN ADVANCE REQUEST

Registration:

When requesting an advance for registration, attach a copy of the registration form with the amount due. If using a purchase order (P.O.) for registration, indicate with "P.O." in the registration advance box.

Lodging:

Limit hotel expense to $85 a night plus appropriate tax. If you are unable to secure a hotel room for this amount, indicate by attaching three telephone quotes for area hotels.

If traveling with grant funds:
You will only be reimbursed for $85 a night for hotels.

The District is exempt from state occupancy taxes. The employee is responsible for presenting the Texas Hotel Occupancy Tax exemption certificate upon check-in at the hotel and will not be reimbursed for Texas occupancy tax. Contact the MISD accounting office for an exemption certificate. The District is liable for all taxes other than state taxes, such as city, county,etc, and will reimburse such taxes.

Airfare:

Airfare may be obtained through a travel agency with the use of a purchase order. If so, please indicate by stating "P.O." in the airfare advance box. If requesting an advance for airfare reservations made online, attach a copy of the airline receipt. Please note the district does not pay extra fees for early bird check in or preferred seating.

Mileage:

Mileage allowance is paid at $.67 per mile.

Car Rental:

If renting a car, include the physical damage and theft insurance offered by the rental company.

If using a P.O. for the rental, indicate with "P.O." in the box.

Meals:

Employees:
For advances, enter $8.00 for breakfast, $10.00 for lunch and $18.00 for dinner.
Note: Meals are not advanced or reimbursed unless traveling overnight. Also, do not request meal per diem for conference provided meals. Alcoholic beverages can NOT be purchased with district funds.
If traveling using grant funds, meal allowances can be advanced but actual receipts must be provided upon return and can only be reimbursed to the maximum of the per diem amount. DETAILED receipts are required for grant meals.
Actual meal receipts are required for grant funds only.
Students:
Funds can be advanced for student overnight travel at the per diem amounts. Attach a roster of the student names. The student must sign for all meal funds.

Miscellaneous and Materials

An advance can be granted for taxis, shuttles, tolls, and parking. Receipts of all items must be included upon return.

An amount can be advanced for miscellaneous items; however, Texas state sales tax will not be reimbursed.
It is the employee's responsibility to present a sales tax exemption certificate for miscellaneous purchases.

-REMEMBER TO KEEP ALL RECEIPTS AS INDICATED****
****ABOVE!!!******

REQUESTING AN ADVANCE

Present your completed advance request to your principal/ supervisor for approval. Upon approval, your secretary/ bookkeeper will enter a direct pay. Travel advances must be submitted at least two weeks before the date of travel.

UPON RETURN FROM THE TRIP-RECONCILING OR REQUESTING ADDITIONAL REIMBURSEMENT

Registration:

If you requested an advance for registration, include your receipt or a copy of your original registration form with fees paid.

Lodging:

An original itemized receipt is required. Receipts without daily charges itemized will not be accepted. If a detailed receipt is not provided, the amount advanced for lodging Is subject to disallowance and the employee must repay the hotel advance. State occupancy tax will not be reimbursed.

Only business phone calls will be reimbursed. Please indicate with a short explanation of business discussed.

Airfare:

Attach all appropriate receipts.

Car Rental:

Include paid receipt from the car rental agency.

Mileage:

Mileage is subject to verification. Attach such verification from a mapping program such as Map Quest inidicating the miles driven to the destination.

Meals:

Employees:
Will be provided per diem only for overnight travel.
If using grant funds, actual detailed meal receipts must be provided
Students:
If providing meal per diem for overnight travel for students, the student must sign for funds provided.

Miscellaneous and Materials .

All such expenses will only be reimbursed with appropriate receipts. Please tape receipts to a piece of paper in date order, so they are displayed in a neat and orderly manner.

Texas state sales tax will not be reimbursed on materials purchased.

SUBMITTING REPORT

Immediately upon return submit your final trip expenses to your secretary/bookkeeper. If the amount advanced, exceeds total expenditures, repayment is required. If total expenditures exceeds the amount advanced, enter the amount due the employee. The secretary/bookkeeper will process a direct pay request for reimbursement that must be approved by the appropriate supervisor.

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