

**Fort Bend Independent School District**  
**Employee Travel and Expense Reimbursement Policy**  
**DEE (R)**

**Introduction**

Persons authorized to travel for business and educational purposes on behalf of Fort Bend ISD (the “District”) shall be reimbursed for all usual and reasonable travel related expenses made on behalf of and in connection with District business. Employees are expected to select the most economical and practical accommodations, arrangements, and services. All employees must use Mapquest, using the shortest distance, upon final reimbursement requests.

An employee must submit the Fort Bend ISD Request for Absence Professional/Paraprofessional leave form (DEC-E-1) and receive prior approval from their supervisor prior to incurring any overnight travel related costs resulting from approved professional leave (DMD-R).

**If prior approval has not been has, the District may deny the reimbursement to the employee.**

Original receipts are required for travel reimbursements and must be kept and maintained by the campus/departments in accordance with the District’s Record Retention policy.

Final reimbursements are required to be submitted to Accounts Payable within 10 days of employees return from trip.

**Travel Policy for In-District, Local, and Out-of-District Travel**

In-District Travel – All travel within the Fort Bend ISD boundaries.

Day Trips – All travel within 50 miles of the employee’s home address and where an overnight stay is not required. All travel policies for day trips are the same as those for overnight trips with the exception that meals are not reimbursable by the District.

Lodging may be approved if employees share a room and carpool to the event or prior approval by cabinet member.

Overnight Travel – All other travel outside the District and over 50 miles from the employee's home address.

International Travel – All international travel by students must be approved by the Board of Trustees. (See FMG Local).

Out-of-State Travel – All out of state travel must have Cabinet Level approval (See DMDR).

#### Employee Responsibilities:

1. Complete the Fort Bend ISD Travel and Request and Payment Voucher form (DEE-E-1) and submit to budget manager for approval within 3 weeks of travel.
2. Attach any conference agendas, brochures, etc. to the DEE-E-1.

#### Budget Manager Responsibilities:

1. Ensure funds are available based upon estimated travel costs prior to authorizing travel.
2. Ensure the individual traveling is informed of this policy.
3. Ensure the Fort Bend ISD Request for Absence Professional/Paraprofessional leave form (DEC-E-1) form is completed and approved.
4. Ensure the Fort Bend ISD Travel and Request and Payment Voucher form (DEE-E-1) is signed by the employee and forward to cabinet for approval if traveling out of the state. **All travel requests should be approved with 3 weeks of travel.**

#### Prepaid Expenses:

Employees are strongly encouraged to prepay expenses such as hotel and conference fees directly to the vendor.

The following expenses may be prepaid either by purchase order, check request, or District purchasing card and should include the approved DEE-E-1. Prepayments made by check request must be sent to Accounts Payable three (3) weeks prior to travel. If traveling using Federal or Grant funds, please refer to the section on Travel using Federal Funds for more information.

1. Seminar/Conference Fees
2. Airfare
3. Lodging
4. Rental Vehicles

Individuals will make their own travel arrangements using the most economical travel available.

Employees are required to use the most economical mode of transportation.

### **Seminar/Conference Fees**

Seminar/Conference fees will be reimbursed based on the amount charged.

### **Airfare**

1. Employees are encouraged to fly if the cost of the employee's reimbursement for mileage, vehicle rental, taxi (or shuttle), etc would be more than the price of the airline ticket.
2. Airfare should be purchased from the most economical source available. Employees may purchase airfare directly or use a departmental procurement card. If an employee elects to pay for airfare out of pocket, the airfare will be reimbursed upon completion of travel, subject to submission of the completed Travel Request and Payment Voucher and proof of attendance.
3. One baggage fee per destination within the airline's allowable size and weight limits will be reimbursed. All other baggage fees are the responsibility of the traveler.

### **Lodging**

Hotel selection should be made based upon cost as well as safety, comfort, and proximity to convention activities; however the district will not reimburse for lodging if the event is within 50 miles of the employee's home address without Cabinet Member approval. Upon return from event, the employee is required to turn in paid itemized hotel bill to receive final reimbursement.

State rates should be requested when making a reservation. State approved hotel rates can be found at:

(<http://www.window.state.tx.us/procurement/prog/stmp/stmp-hotelcontract/>).

If required, convention rates will be accepted.

Cabinet Member preapproval is required on rooms exceeding \$175.00 (before applicable taxes) per person per night. If this is not done, the difference will be paid by the employee and deducted from overall reimbursement.

For travel within Texas, lodging will be reimbursed for the room rate plus local taxes, such as city, county, and etc. It is the employee's responsibility, upon arrival at the hotel, to present the Texas Hotel Occupancy Tax Exemption Certificate to receive the exemption from state sales tax. State sales tax will not be reimbursed.

For travel outside Texas, lodging will be reimbursed for the room rate plus all applicable taxes. Original itemized receipts required.

## **Final Expense Reimbursements**

### **Meal Allowance**

Employees are to request to be reimbursed for the actual cost of meals up to \$35 per day for food only. If an employee's trip begins after noon or ends before noon,

employees are to request to be reimbursed meals up to \$17.50 per day will be computed. Meal receipts are not to be sent to Accounts Payable if travel is using general funds. If traveling using grant funds, the receipts are to be maintained and kept by the appropriate department.

Any amount specifically identified, on the conference agenda required, as a meal should be subtracted from the reimbursable totals: \$10 for breakfast; \$10 for lunch; and \$15 for dinner.

Employees traveling with students may request a per diem advance for the students. Sponsor's meals are to be submitted as a final reimbursement.

### **Personal Vehicle**

The maximum mileage reimbursement rate for use of privately owned automobiles is the current State of Texas Comptroller of Public Accounts maximum mileage rate. The current rate can be found at: <https://fm.xcpa.state.tx.us/fm/travel/travelrates.php>.

Mileage may be claimed by attaching an Internet mileage and directions map such as MapQuest to the Travel Request and Payment Voucher. Any additional mileage should be documented on the mileage sheet submitted.

Specific requirements for employees who operate Privately Owned Vehicles (POV) in course of District business includes, but is not limited to:

1. Individuals operating a POV on District business shall maintain liability insurance with at least state required minimum limits. Proof of insurance shall be required and provided to the employee's supervisor upon request. If insurance is cancelled, or changed, it is the driver's responsibility to notify the supervisor immediately.

2. Fort Bend ISD expects employees to operate privately-owned road vehicles in a manner to serve as models for courteous driving and safety.

## **Rental Vehicles**

Rented vehicles should be used only in situations where the cost of local transportation exceeds the cost of a daily car rental.

a) It is the employee's responsibility to present the vehicle tax exemption form to the rental car provider to receive the exemption from the state's sales tax.

b) The District does not reimburse for collision damage waiver insurance or benefits for personal medical insurance as this coverage is already provided by the District.

c) An employee's Motor Vehicle Record (MVR) must be approved by authorized District personnel prior to utilizing or renting a vehicle on behalf of the District.

## **Transportation Costs**

Toll road fees under \$20 are reimbursable without a receipt and should be identified by location.

Local ground transportation costs such as taxis and buses will be reimbursed. Original receipts required. Tips up to 20% may be reimbursed using general funds.

Mileage accumulated within the destination city will not be reimbursed.

## **Parking**

Airport parking will be reimbursed at a rate not to exceed the airport's long term daily parking rate. Reimbursement requests for parking expenses exceeding the airport's long term daily parking rate are subject to Cabinet level approval.

Hotel parking will be reimbursed at the self-parking rate.

## **Internet and Telephone Expenses**

Business calls are reimbursable provided the call is identified on the bill. Only Internet charges for business use will be reimbursed. This must be stated on the Travel Request and Payment Voucher (DEE-E-1).

## **Travel using Federal Funds (Grant Funds)**

Approved travel using state/federal program funds is subject to the state travel guidelines. All travel expenses in excess of the state reimbursement rates will be reimbursed from local funds up to the allowable District travel reimbursement limits.

The Texas Education Agency has outlined the following regarding mileage and travel reimbursements rates applicable to State and Federal Grants:

- a.) The standard rate per night lodging for cities and counties not listed on the Domestic Maximum Per Diem Rates is \$85. The lodging rate for out-of-state travel not listed on the Domestic Maximum Per Diem Rates is \$83.
- b.) Per Diem for lodging and meals are not allowable - actual expenses must be submitted.

Do not apply highlighter ink or tape to any characters on an original receipt. Doing so will cause the receipt characters to disappear and could affect the amount that is reimbursed.

c.) Taxes, tips and gratuities are not reimbursable from grant funds but may be charged to general funds.

When making hotel reservations, a copy of the schedule from the Domestic Maximum Per Diem Rates website is now required at the time the reservation is made and should accompany the check request. The district can only authorize payment of \$85 per night for cities and counties not listed on the website from grant funds. If the county and city is listed, up to \$85 plus city tax will be covered by the grant for travel within the state of Texas. The difference between the amount the grant will cover and the actual lodging expense must be paid from the campus or departmental local budgeted funds.

The Accounts Payable department must have a copy of the Domestic Maximum Per Diem Rates schedule at the time the reservation is made. If a copy is not attached the lesser amount of \$85 will be applied from grant funds and any remaining amounts will be charged to the campus or department local budget.

### **Student and Nonemployee Chaperone Travel**

Expenses incurred by students and nonemployee chaperones for travel approved by the District shall be reimbursed. Travel policies for students and nonemployee chaperones will be the same as for employees with the following exceptions:

1. Advance approval for the employee(s) who accompany the students and nonemployee chaperones constitutes advance approval for the students and nonemployee chaperones. The Student Travel Request Form and Itinerary Form are required with a copy of the approved Travel Request and Payment Voucher.
2. If the nonemployee chaperone is a spouse of an employee traveling with the group, the appropriate assistant superintendent must determine the need for a chaperone and approve the chaperone for travel prior to the trip.
3. Students will receive a flat dollar amount per meal for day trips and overnight trips.
4. Nonemployee chaperones will be reimbursed for meals using per diem rates. Alcoholic beverages will not be reimbursed.

## **Employee Mileage Reimbursements**

Mileage reimbursement will be paid if assigned duty is required by supervisor and use of privately-owned vehicle (POV) is required. Budget manager should be aware of trip and give employee consent prior to the trip.

Specific requirements for employees who operate Privately Owned Vehicles in course of District business includes, but is not limited to:

1. Individuals operating a POV on District business shall maintain liability insurance with at least state required minimum limits. Proof of insurance shall be required and provided to the employee's supervisor upon request. If insurance is cancelled, or changed, it is the driver's responsibility to notify the supervisor immediately.

2. Fort Bend ISD expects employees to operate privately- owned road vehicles in a manner to serve as models for courteous driving and safety. The District shall reimburse mileage based upon the following guidelines when an employee is required to travel to conduct District business:

- a. Travel between all Fort Bend ISD locations shall be reimbursed based upon the established mileage guidelines. (I.e. travel from Hightower HS to Central Office)

- b. On regular work days, travel to/from an employee's residence or work location to a location outside of the District shall be reimbursed based upon the lesser of the rate that would be generated from the employee's residence or worksite if travel occurs at the beginning or end of a work day. (I.e. travel from residence to downtown Houston for early morning conference on Tuesday. If the employee lives close to downtown, then the reimbursable mileage is from their house to the conference site. If the employee's worksite is closer to downtown than the residence, then the reimbursable mileage is from their worksite to the conference site)

- c. During regular work days, travel from an employee's work location to a location outside of the District and back to the employee's work location shall be reimbursed based on the mileage to and from the location outside of the district. (I.e. travel from Travis HS to Region IV for mid-day meeting)



d. Before or after regular work days, travel to a location within the district shall be reimbursed based upon the lesser of the rate that would be generated from the employee's residence or worksite. (I.e. travel from home/Travis to Mercer Stadium for game duty)

e. Travel occurring on weekends or holidays to any location shall be reimbursed from the employee's place of residence. (I.e. Ag teachers going to barn on holidays and weekends or Athletics going to district games on weekends and holidays)

f. Mileage totals for items 2 through 5 must be substantiated by MapQuest or similar tool.

g. Itinerant employees shall be reimbursed mileage to and from their primary work location to other locations in the district.

h. Voluntary attendance of any work related function is not eligible for mileage reimbursement. (I.e. going to school game when not required attending by campus administration, on contract (i.e. going to central office to turn in paperwork for Benefits)

### **Other Allowable Expenses**

The District will pay for professional development upon approval.

License renewals will be reimbursed by the District. .

Meals for weekend conferences will be reimbursable if the employee is not being paid extra duty. Please see the Meal Allowance section for breakdown.

### **Unallowable Travel Expenses**

- Travel club membership fees, miscellaneous incidentals, entertainment, alcoholic beverages, in room movies and other personal expenses are not reimbursable. The employee is responsible for all fees associated with any of these expenses
- No expenses associated with an employee's spouse or children who accompany an employee on a district funded trip are reimbursable.

- Employees are not allowed to use student activity club accounts for membership dues or convention travel. Such expenses should be reimbursed by the district's budgetary accounts.
- Employees may not use district funds for the reimbursement of additional liability insurance. Any additional insurance the employee wishes to have during a district sponsored out of town event is the responsibility of the employee.
- An employee wishing to participate in the optional meals or activities offered by a conference or convention is responsible for the fees associated with such an event and must submit a personal check payable to the organization along with the Travel Request and Payment voucher.
- Telephone calls and internet use for personal reasons are not reimbursable.
- Conference apparel (T-shirts, etc.)
- Entertainment, recreation, or social events
- Alcoholic beverages
- Any expense that does not relate to official school business
- Expenses not supported by an original itemized receipts when receipts are required
- First class airfare
- Tuition expenses for employees will not be allowed by the District.
- Hotel valet parking will not be reimbursed unless it is the only option for parking

### **Supplies and Food Purchase Reimbursements**

Business Lunch – Any meal that is provided for a meeting that is longer than 2 hours or one where a vendor is present.

In order to be reimbursed or have meals provided, the District will require the following information based off IRS policy:

1. Business purpose
2. Amount of expense
3. Date and place
4. Name(s) and business relationship of all persons attending

Employees making purchases for office supplies, such as coffee, snacks, water, etc. may be reimbursed with faculty funds (vending, hospitality, etc.).

Taxes on food purchases and business lunches will be reimbursed using general funds.

Employees are encouraged to purchase classroom and office supplies through the District's purchasing policies and procedures. Employees purchasing items on behalf of the District with personal funds are required to have prior approval before the purchase is made.

**All other expenses not covered in this policy are left up to the discretion of the Business and Finance department.**

### **Sponsor Travel:**

One sponsor for the 1st 20 students and additional sponsor for the next 20 students will be paid through district general or grant funds. All additional sponsors will need to be paid through the campus funds or student activity accounts at the campus.

FBISD does not pay travel expenses for non-FBISD employee chaperones.

Tips for chartered bus drivers should be collected per person on the bus and should not be paid using district funds.

Sponsors should not use student activity funds to purchase their personal membership dues and/or convention travel. Student activity funds may be used to purchase the membership dues and/or travel expenses for students in that club.