

Chilton County Board of Education Travel and Reimbursement Procedures

Purpose: To outline the procedures for the documentation and reimbursement of travel and expenses incurred by employees and board members of the Chilton County Board of Education and consultants employed by the School District.

Procedures:

EMPLOYEE REQUEST FOR TRAVEL

A *Professional Development Form* must be submitted for approval at least 7 business days prior to travel (unless there are extenuating circumstances that have been approved by the Superintendent **in writing**). One Professional Development Form per individual is required.

The Professional Development Form must include **all costs** of mileage, commercial transportation, meals, lodging, registration fees and any other allowable expenditure. Mileage reimbursements will be determined by Google Maps (Google Maps documentation must be attached). All employees are expected to travel as economically as possible. **These estimated expenses are the maximums that will be reimbursed.** *Unauthorized travel/expenses not documented on this form will be at the expense of the employee.*

PURCHASE ORDERS AND PREPAYMENTS

Once approval has been granted, a purchase order can be requested for registration fees to be paid in advance. One PO will be issued for all employees attending the same workshop. If the employee must cancel the trip and a replacement employee cannot attend, any prepaid expenses shall be repaid to the Board by the employee.

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EMPLOYEE REIMBURSEMENT REQUESTS

A Request for Reimbursement Form must be submitted within 7 business days following the employee's return to work from travel. All applicable sections must be completed. The following documents **must** be attached: an approved Professional Development Form; agenda, brochure or some other form of documentation to substantiate need for travel; Google Maps; and itemized original receipts for all other allowable expenditures. After approval by the employee's supervisor, the form will then be forwarded to Accounts Payable to check for completion, accuracy, and adequate documentation. Travel reimbursement checks will be included in the first available Accounts Payable check run.

Please Note: Requests that are not submitted following all guidelines set forth above will be returned to the traveler.

Each employee is responsible for paying his/her own expenses and claiming his/her own reimbursement. Employees should never pay for another employee's expenses and expect to be reimbursed for these expenses. Reimbursement is granted for PERSONAL expenditures only.

Please refer to Part A through Part E for complete instructions on completing the Travel Reimbursement Request Form.

Part A - Mileage

Employees may be reimbursed for business miles traveled in a personal vehicle at the Standard Mileage Rate prescribed by the Internal Revenue Service. Reimbursement is based on the most DIRECT route provided by Google Maps, meaning the employee will be reimbursed from his or her home or work location, whichever is closest to his or her destination only. If possible, employees traveling to the same location for the same purpose should carpool. Rental car expense will only be reimbursed with proper justification and pre-approval.

Dates, destinations and times of departure and return **are required** on the Request for Reimbursement Form in order to receive reimbursement.

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Part B - Meal Allowances:

An employee will be reimbursed for actual meal expenses up to the maximum allowance with return of an original itemized receipt. A gratuity of up to 20% may be included; however, this must be reflected on the receipt. Guest(s) traveling with the employee should order meals separately so that these meals are not included on the itemized receipt. Family meals will be divided. *Expenses in excess of the prescribed limit will not be reimbursed.*

The maximum meal allowance is \$60 per day and based on the following 3 eligibility requirements:

1. An employee is eligible for the breakfast meal if they are on travel status prior to 6:30 a.m.
2. An employee is eligible for the lunch meal if they are on travel status between 11:00 a.m. and 2:00 p.m.
3. An employee is eligible for the dinner meal if they are on travel status between 6:00 p.m. and 8:00 p.m.

No meal allowance may be claimed if a meal is included in conference registration.

Part C - Lodging:

Employees may be reimbursed the actual cost of lodging with return of an original itemized invoice/receipt. Employees attending an overnight conference or event being held at a facility with lodging should make every effort to stay at the hosting facility. If possible, employees traveling to the same location for the same purpose should share lodging. **If a conference room rate is offered, that is the maximum amount that will be reimbursed no matter where the employee chooses to lodge.**

Employees sharing rooms should be cautious of the name in which the room is billed unless a split invoice/receipt is issued. Only the employee listed on the invoice/receipt will receive reimbursement for the trip. The employee requesting lodging reimbursement should be the employee who received prior approval on his or her Professional Development Form. If employees are required to share rooms and an employee chooses

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to room by him/herself or bring family members rather than sharing a room, reimbursement will be at the shared rate. The receipt must show a zero-balance due reflecting the cost of the room has been paid in full.

Hotel expenses will be reimbursed for conferences and events located beyond a 75-mile radius only.

Travelers are expected to exercise good judgment and sound fiscal policy when deciding upon time and date of travel departure and return. The Finance Department may deny reimbursement or require written justification in cases where departure and return dates/times appear excessive.

Part D - Commercial Transportation:

Costs of commercial transportation are limited to air fare (coach only) and baggage handling fees (\$25.00 maximum each way) providing the return of the original itemized receipt.

Part E - Miscellaneous Expense:

Other allowable miscellaneous expenses will be reimbursed upon providing the dated receipt reflecting such costs. Such expenses include parking and toll fees, as well as shuttles and taxi costs, related to the transportation between the airport and hotel. The Board of Education will not reimburse the employee for unallowable expenditures such as alcoholic beverages, snacks, meal delivery fees, convenience fees, personal supplies, hotel internet, entertainment or valet parking*.

*Valet parking may be reimbursed in the event that it is the only means of parking available.

Please Note: Cash register tapes, scraps of paper or other reimbursement claims that are not determinable as to the date, the place and the type of expenditure will be disallowed for reimbursement.

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OTHER PROVISIONS

The Superintendent or CSFO may authorize exceptions to the provisions set forth if he/she deems the exceptions necessary to meet the needs of the school systems operations. Principals or Central Office Administrators may request the Superintendent's or CSFO's authorization of exceptions **in writing** with an explanation of the circumstance to justify the need for making the exception.

These forms and guidelines are required of ALL employees of the Chilton County Board of Education and are located on the Chilton County Board of Education website (<https://chiltoncsal.schoolinsites.com/>) under the Teaching and Learning section and also under the Finance section.