

Travel Procedure

Attendance at professional or educational meetings requiring travel involves the following three (3) basic steps:

Note: This procedure was developed to help clarify what is needed for efficient processing of a travel request and related documentation.

1. *Request to Attend Professional or Educational Meeting* - submitted and approved.
 - Copy of registration form should be filled out and attached to the *Request to Attend*, for any applicable conference, seminar, etc.
2. *Requisition to cover all associated, known costs* - submitted by traveler.
 - Please include separate requisitions for airline tickets, registration fees, hotel/lodging.
 - Note: It is helpful if copies of all requisitions in step #2 are attached to the *Request to Attend* in step #1 and submitted together. This will expedite processing paperwork since requisitions require the same approval process.
3. *Request for Reimbursement Following Approved Attendance at a Professional or Educational Meeting* - submitted by traveler.
 - The **approved** *Request to Attend* must accompany this form in order to receive reimbursement.
 - *Reminder:* Traveler will be reimbursed for up to \$50 per day maximum for meals when trip requires overnight stays out of town. Original, itemized receipts must be attached including receipts for meals. Alcoholic beverages will not be reimbursed.

Note: Traveler is responsible for making all his/her own travel arrangements, i.e., airline reservations, hotel/lodging reservations and getting registered for the conference/seminar.

	Traveler	Secretary	Administrator
1. <i>Request to Attend Professional or Educational Meeting.</i>			
a. Prepare <i>Request to Attend</i> form.	✓		
b. Submit <i>Request to Attend</i> to supervisor for signature.	✓		
c. Supervisor signs <i>Request</i> and forwards to secretary for handling (secretary will forward on to Supt. - see next step).		✓	
d. Secretary makes a copy of the <i>Request</i> for his/her files and forwards to Superintendent.		✓	
e. Superintendent approves or denies <i>Request</i> and forwards form to Exec. Secretary.			✓

	Traveler	Secretary	Administrator
f. Exec. Secretary distributes approved/denied <i>Request to Attend</i> as follows:		✓	
a. Original returned to traveler.			
b. Copy kept at Central Office			
g. Traveler retains original for submission with any request for reimbursement for out-of-pocket expenses associated with the trip.	✓		

2. *Requisition* to cover **all** associated, known costs.

a. If applicable, traveler makes airline reservation, prepares <i>Requisition</i> for airline ticket; and submits form to supervisor for signature (attach copy of itinerary if possible). Traveler obtains a confirmation number from the airline and includes that on the <i>Requisition</i> .	✓		
b. If applicable, traveler chooses hotel and calls to reserve room, prepares <i>Requisition</i> for hotel/lodging; and submits form to supervisor for signature. Traveler obtains a confirmation number from the hotel, and includes that on <i>Requisition</i> .	✓		
c. If applicable, traveler registers for conference/ seminar, prepares <i>Requisition</i> for registration costs; and submits form to supervisor for signature.	✓		
d. Supervisor signs <i>Requisitions</i> (a - c) and gives to Secretary for handling (Secretary will forward on to Superintendent - see next step).			✓
e. Secretary files copy of <i>Requisition</i> and forwards to Superintendent.		✓	
f. Superintendent approves the <i>Requisition</i> and forwards to the Director of Business Services.			✓
g. Director of Business Services signs the <i>Requisition</i> and creates a Purchase Order.			✓

	Traveler	Secretary	Administrator
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- h. Business Office sends P.O. to vendor and files appropriate paperwork for audit trail. ✓

3. *Request for Reimbursement Following Approved Attendance at a Professional or Educational Meeting*

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| a. | If out-of-pocket expenses occurred, a <i>Request for Reimbursement Following Approved Attendance at a Professional or Educational Meeting</i> form is prepared and submitted to supervisor for signature. (Attachments required are: Original copies of all receipts and the original, approved <i>Request to Attend</i> .) | ✓ |
| | <ul style="list-style-type: none"> • Traveler may wish to make a copy of the <i>Request for Reimbursement</i> before forwarding. | |
| b. | Superintendent approves the reimbursement claim and forwards to Director of Business Services. | ✓ |
| c. | Business Office processes paperwork, retains copies for audit trail, cuts a check (once the Board approves at its regular monthly Board meeting) and sends to the traveler. | ✓ |
| d. | Traveler smiles =) good job!! | ✓ |