

Travel Authorization and Travel Expense Reimbursement

All travel requests and expense reimbursement claims, regardless of the amount, are subject to the authorizations designated in Policy 6213.

A. Travel Claim Forms

1. **Local Travel** – *subject to automobile mileage reimbursement and does not require an overnight stay.*
 - a. Complete Travel Request Web Form if registration fee is required or travel time is in excess of 12 hours.
 - b. Submit web form through *BusinessPLUS* to obtain employee and appropriate level of signatures.
 - c. Within 15 days of travel occurrence, complete Travel Reimbursement Web Form for items needed to be submitted for reimbursement payment.

2. **Extended Travel** – *for travel that requires an overnight stay. (Travel that includes an overnight stay within 50 miles of the district requires an agenda from the conference showing an employee is required to be at the event early in the morning and/or late in the evening or a benefit to the district can be determined).*
 - a. Complete Travel Request Web Form at least 30 days prior to travel date.
 - b. Submit web form through *BusinessPLUS* to obtain employee signature and appropriate level of supervisory approval.
 - c. Once Travel Request Web Form is approved, an email will be sent to the traveling employee by Accounting Department stating that travel has been administratively approved. This approval is valid for 10 days following approval.
 - d. Once approval email is sent, travel arrangements can be made according to Travel Claim Guidelines outlined in the Procedure 6213P, Section C below.
 - e. In addition to the approval email, Accounting will send an email including the appropriate per diem amounts (meals) allowed and airline travel agency contacts if applicable.
 - f. Upon completion of travel, complete the *Travel Reimbursement Web Form* and attach all required documentation (see Required Attachment document). This form must be received by Accounting within 15 days after returning from travel status.

B. Authorization of Travel

- a. Travel outside of the state of Washington, including all international travel, must be approved by the Board in advance of such travel.
- b. Travel outside of the Bellevue School District and within the state of Washington that requires an overnight stay, registration fee or in excess of 12 hours must be approved by the supervisor and person with budget authority in advance of such travel.
- c. Local travel that does not include a registration fee does not require prior approval.

C. Travel Claim Guidelines

All reasonable, necessary and substantiated expenses of employee approved for travel shall be reimbursed in accordance with district-adopted guidelines.

1. Meals

- a. Employees traveling on behalf of the district and requiring a justified overnight stay (see local travel for exception) shall be provided daily Per Diem for meals using the General Services Administration (GSA) rates.
- b. It is not necessary to submit meal receipts.
- c. Employees must be in travel status the entire day to claim reimbursement/per diem for meals.
- d. The first and last day of travel will be reimbursed for 75% of the allowed per diem rate (*maximum the IRS allows*)
- e. When completing the Travel Request Web Form use a blanket amount of \$71/day for meal per diem. (Accounting department will make any necessary adjustments and inform you via approval email)
- f. A per diem will not be issued if the meal is provided as part of the meeting or conference.
- g. Meal per diems may be requested in advance. An Extended Travel Advance for Per Diem form must be completed and submitted to the Accounting Department at least 15 days prior to travel. See Section E. Travel Advance for more information.

2. Air Fare

- a. Traveler **must** use district designated travel agency when booking airfare. Airline purchases on school, department or personal credit cards is not allowed.
- b. The District designated travel agency can book airfare only after receiving approval from the Accounting Department of the Bellevue School District.
- c. Travel agency contact information will be provided to traveler once travel is approved.

3. Hotel and Other Costs

- a. Procurement Card (P-card) or Travel cards (checked out by Accounting Department) can only be used for hotel costs, registration or other approved travel related expenses.
- a. Lodging expenses will be reimbursed based on actual hotel receipt not to exceed the pretax GSA government rate. While attending a conference, lodging at the designated conference hotel is allowed at the standard room rate
- b. Registration or other approved travel expenses (tolls, baggage fees, parking) will be reimbursed based on actual receipts.
- c. All non-substantiated charges need to be repaid to the district no later than 30 days after travel has occurred.
- d. Original receipts must be retained and submitted to Accounting at the time of reimbursement or return of travel card.

D. Reimbursement of Expenses

1. All reasonable, necessary and substantiated expenses of employee approved for travel shall be reimbursed in accordance with district-adopted guidelines.
2. Other modes of transportation different than airfare (i.e.train, bus) shall be reimbursed based on the most efficient model of travel that minimizes direct expense.
3. All non-substantiated charges need to be repaid to the district no later than 30 days after travel has occurred.
4. Entertainment-related costs and alcoholic beverages are regarded as non-allowable expenses in all instances and therefore will not be reimbursed.

E. Travel Advances

1. A travel advance may be requested for per diem meal amounts. An *Extended Travel Advance for Per Diems (Meals) Form* must be signed and submitted to Accounting at least 15 days prior to travel.
2. The district has the right to withhold funds (through Payroll deduction) for any amount not substantiated or allowed by state or federal laws or school district policy.

Date: 9.15, 2.16