



BURKBURNETT
INDEPENDENT SCHOOL DISTRICT

TRAVEL CHECKLIST

To ensure compliance with Board Policy, the following checklist has been developed to aid district travelers.

Reminder:

- *Tips are an unallowable cost for reimbursement from all funds, with one exception of large student groups that require an automatic gratuity.*
- *Out-of-state travel is an unallowable cost for federal funds, with the exception of HeadStart Funds-Fund 205 or unless prior approval is obtained by granting agency.*

Travel Preparation:

- Submit a Time-Off request through Skyward using the appropriate time-off code, reason code, and comment that describes the travel event or Request for Travel Advance (Student Trips)
- Review Burkburnett ISD Travel Procedures and the Everything YOU Need to Know Before You Travel training document on the district's website.
- If traveling by air, obtain prior approval from Grant Manager and Director of Business & Finance.
- Obtain current GSA lodging rates and travel reimbursement rates for federally funded trips. (Remember-any rates/reimbursement over the GSA travel rates/reimbursement will be the traveler's responsibility)
- Obtain pricing information for lodging
- Obtain copy of training/conference brochure/information to verify registration fees and deadlines
- Verify funds exist in your campus and/or department budget

Before the Trip (as applicable):

- After receiving approval for the trip submit an online requisition and/or check request (whichever is suitable for the expense) for the travel with the following attached (as applicable):
 - GSA Lodging rates (Federal Funds Only)
 - Copy of Registration Fees
 - Copy of Training/Conference Brochure and/or Schedule-Agenda
 - Copy of Lodging Pricing
 - Copy of Airfare Pricing
 - Any Other Documentation Deemed Necessary for Trip
- Student Trips Only:***
 - Completed Request for Travel Advance
 - Copies of Lodging Pricing
 - Copy of Registration Fees, Entry Fees, etc.
 - List of students participating in the trip
 - Any Other Documentation Deemed Necessary for Trip
- Obtain a Hotel Occupancy Tax Exemption Certificate for lodging before leaving for trip.

After the Trip (as applicable):

- Complete and obtain your supervisor's signature and then submit the Travel Expense Report **in paper form** with **original detailed receipts** within three (3) days of the trip to the Director of Business & Finance. (Federal Funds go to Grant Manager, who will then submit to Director of Business & Finance)
 - Attach Conference Agenda
 - Attach **original detailed receipts** for all meals (if traveling with Federal Funds)
 - Attach map/mileage proof for mileage reimbursement (MapQuest)(Mileage is paid only if it is the best value to the District)
 - Attach **original detailed receipts** for all transportation (taxis, shuttles, rental cars, etc)
 - Attach **original detailed receipts** for parking
 - Attach hotel **original detailed receipt**
 - Attach Proof of Attendance- Certificate of Training or Registration receipt (if applicable)
 - Any travel expenditures exceeding the district travel rates will not be reimbursed

HAVE A GREAT TRIP!!!