

LWISD TRAVEL PROCESS

The following steps are provided to anyone who will be traveling on official business for Lake Worth ISD.

Please refer to the [LWISD Travel Guidelines & Procedures](#) for a full understanding of acceptable and unacceptable travel expenses.

Note: Travel expenses incurred due to the fault of a traveler, except for extenuating circumstances, such as late registration, cancelled flight, etc. are not considered to be reasonable or necessary; therefore, all such expenses shall be paid or reimbursed by the traveler.

To help reduce travel expenses and in turn allow our students more opportunities and experiences, LWISD is asking all employees to travel in the most frugal manner possible by saving wherever possible on meals, mileage, lodging, etc.

Helpful Links:

[LWISD Travel Page](#) which includes links to:

[Authorization Form for District Travel and Reimbursement](#)

[Per Diem and Mileage Estimator for Professional Travel](#)

[Per Diem and Mileage Estimator for Travel with Students](#)

[LWISD Travel Checklist](#)

[Travel Flow Chart](#)

[GSA Lodging Rate](#)

PROFESSIONAL TRAVEL

The following items are the responsibility of the employee who will be traveling, referred to as the traveler.

Step 1- What the traveler needs to do first - begin a minimum of 3 weeks prior to travel dates:

- Get tentative permission from supervisor to travel. Out of state travel requires Superintendent approval.
- Review and complete the Travel Card Manual document (required annually). Document is on the district Travel webpage.

Step 2- Gather details & estimates- minimum of 2 weeks prior to travel dates:

- REGISTRATION
 - Obtain the registration fee, conference details & itinerary [Only register if a PO is already in place].
- LODGING- *If staying overnight outside of Tarrant County.* Lodging inside Tarrant County requires Administrator & Chief Financial Officer or designee approval.
 - Print the GSA lodging rate for the destination [this will help you know how much the district will pay toward the lodging].
 - Get an estimate for hotel expense or make a reservation. Traveler can request to use a District travel card for the reservation. If the hotel is going to charge a deposit for the reservation, then a PO will need to be entered before a District Travel card can be issued. If the traveler uses a personal card to reserve the hotel, then the traveler is responsible to update the card used by the hotel at the time of check in.
 - Find out what parking charges the hotel might have.
 - Find out if the hotel provides any meals.
- MEALS- *If staying overnight outside of Tarrant County.*
 - Meals- you may use the Professional Travel Daily Per Diem & Mileage Estimator for assistance if meals are being provided by the hotel and/or conference. Otherwise meals are calculated @ \$51.00 on travel days and \$68.00 on full days. [*Rates may change as the GSA updates their per diem rates.]
- MILEAGE
 - Print the first page of the google map from their work location to the destination [DO NOT print pages of driving instructions].
 - Decide if taking POV or district vehicle [If a district vehicle, enter a transportation request to Transportation].
 - Mileage- you may use the Professional Travel Daily Per Diem & Mileage Estimator or take the round trip miles and multiply it by the mileage rate [district vehicle = \$0.67 per mile, POV = \$0.70- POV rates are subject to change- verify current rates at <https://www.gsa.gov/travel-resources>]
 - If taking a district vehicle will require a bus driver or transportation staff to drive, a Driver Trip Fee of \$30.00 will be charged to the travel budget code.
- PARKING
 - Parking- estimate total parking expenses at hotel and conference.
- OTHER
 - If airfare is involved, get estimate(s) from preferred airlines [all air travel must be approved by the Superintendent].
 - Other charges such as Uber/Taxi/Rental Car- get estimates.

Step 3- Complete Travel form- minimum of 2 weeks prior to travel dates:

- Complete the Authorization for Travel: Professional or Student Form [found on the web under Business Services/District Travel].

Step 4- Turn in Travel packet- minimum of 2 weeks prior to travel dates:

- Turn in the completed Authorization form and all the backup listed above that you have obtained to your campus/department secretary or bookkeeper.
- Your campus/department secretary or bookkeeper will enter a PO Requisition for the registration and a Travel Requisition for the other expenses possible during the travel into Skyward where it will go through the approval process of your supervisor, Business Services, and the Chief Financial Officer or designee. [Superintendent, Special Programs, and other administrators as needed].

Step 5- Wait for approval

- Once your packet is approved you will receive additional information from Business Services about when the travel packet will be available to be picked up. If you have not already done so, make sure to complete the Travel Card Manual process online.

Step 6- Receive travel items

- You will receive an email with information about when the travel packet will be available to pick up. Usually, the packet will be available one business day before the start of the travel.
- You will be issued an envelope containing a copy of your Travel PO, TCard, hotel tax exemption form, and sales tax exemption form.

Step 7- Travel and enjoy and learn a lot!

- While you are on your trip-
 - Present your hotel occupancy tax exemption form to the hotel at check-in. They will use that form to remove the State Sales Tax from the hotel and parking. If you used your personal credit card to reserve the hotel, you will also need to make sure that they update the card on file to use the district card.
 - Keep your itemized hotel receipt. When you check out, make sure State Taxes have been removed.
 - Keep itemized receipts for all meals. Please make sure to note the amount of the tip if it is not on the itemized receipt. Review the bill before paying and make sure that you are not using the travel card to pay for any items which are not permissible purchases with district funds.
 - Keep any fuel receipts [only when driving a district vehicle].
 - Keep your certification of attendance [if one is provided].

Step 8- Return and submit your travel expenses

- **Return complete travel packet to Business Services within one business day. Most campuses/departments will have the traveler submit the items to the secretary/bookkeeper to review and submit to Business Services.**
 - Attach itemized receipts for all transportation (taxis, shuttles, rental cars, etc.)
 - Attach the itemized hotel receipt (State taxes for Texas hotels will need to be refunded or may be deducted from any reimbursement due to employee)
 - Attach itemized receipts for all meals purchased during travel.
 - Attach registration receipt, if provided
 - Attach parking receipts, if any
 - Travel expenditures shall not exceed the district travel rates
 - **Signature of the traveler is required once the Authorization to Travel document has the "Actual Cost" column completed. If any amount exceeds the estimated cost, then the Administrator signature is also required.**
- Return excess funds, if any, within 1 business day of the travel event
- Travelers will be liable for all credit card charges which cannot be substantiated with original, detailed receipts or are not eligible purchases using district funds. A detailed, signed statement by the traveler may be appropriate for minor charges such as a taxi or shuttle. In the absence of either an original, detailed credit card receipt or an acceptable traveler statement, the traveler shall be required to reimburse the credit charges to the district.
- If any reimbursement is due to employee, it will be processed once the travel packet has been reviewed and the credit card statement(s) for these expenses has been processed. Business Services processes the reimbursement

via direct deposit unless the employee does not have a direct deposit associated with their regular payroll payment. If direct deposit is not available, a paper check will be issued to the employee for reimbursement.

STUDENT-DAY TRAVEL

The following items are the responsibility of the employee who will be traveling, referred to as the traveler.

Step 1- What the traveler needs to do first - begin a minimum of 3 weeks prior to travel dates:

- Get tentative permission from your supervisor to travel.
- Review and complete the Travel Card Manual document (required annually). Document is on the district Travel webpage.

Step 2- Gather details & estimates- minimum of 2 weeks prior to travel dates:

- REGISTRATION & ITINERARY
 - Obtain the registration fee, itinerary [Only register if a PO is already in place].
- STUDENT LIST
 - We will require a copy of the roster or the list of students who will be traveling in addition to any other sponsors traveling.
- MEALS-
 - All students and sponsors shall be eligible for the same meal rates for student travel. The list of students provided shall support the number of meals requested for co-curricular or extra-curricular events.
 - Daily student meal per diem rates are \$30 broken down as follows: \$5 Breakfast, \$10 Lunch, \$15 Dinner.
 - These are the maximum rates, your administrator may have a more restrictive policy as budget allows.
- MILEAGE
 - Print the first page of the google map from work location to the destination [DO NOT print pages of driving instructions].
 - District Vehicle [enter a transportation request to Transportation]
 - District employees are not permitted to transport students in their personal vehicles.
 - Mileage- take the round trip miles and multiply it by the mileage rate of \$0.67 per mile.
 - If taking more than one district vehicle, multiply the total by that amount.
 - If taking a district vehicle will require a bus driver or transportation staff member to drive, then a Driver Trip Fee of \$30.00 will be charged to the travel budget code.
- PARKING
 - Parking- estimate total parking expenses.

Step 3- Complete Travel form- minimum of 2 weeks prior to travel dates:

- Complete the Authorization for Travel: Professional or Student Form [found on the web under Business Services/District Travel].

Step 4- Turn in Travel packet- minimum of 2 weeks prior to travel dates:

- Turn in the completed Authorization form and all the backup listed above that you have obtained to your campus/department secretary or bookkeeper.
- Your campus/department secretary or bookkeeper will enter a PO Requisition for the registration and a Travel Requisition into Skyward where it will go through the approval process of your supervisor, Business Services, and Chief Financial Officer or designee [Superintendent, Special Programs, and Asst. Superintendent as needed].

Step 5- Wait for approval

- Once your packet is approved you will receive additional information from Business Services about when the travel packet will be available to be picked up. If you have not already done so, make sure to complete the Travel Card Manual process online.

Step 6- Receive travel items

- You will receive an email with information about when the travel packet will be available to pick up. Usually, the packet will be available one business day before the start of the travel.
- You will be issued an envelope containing a copy of your Travel PO, TCard, and sales tax exemption form.

Step 7- Travel and enjoy!

- While you are on your trip-
 - Keep itemized receipts for all meals and have students sign a sheet stating they received a meal.
 - If you received an advance for meal money, a sheet will be provided for the students to sign.
 - Keep any fuel receipts.

Step 8- Return and submit your travel expenses

- **Return complete travel packet to Business Services within one business day. Most campuses/departments will have the traveler submit the items to the secretary/bookkeeper to review and submit to Business Services.**
 - Attach itemized receipts for all transportation (taxis, shuttles, rental cars, etc.)
 - Attach copy of student meal money receipt form [student signatures for receipt of meals]
 - Attach itemized receipts for all meals purchased during travel.
 - Attach registration receipt, if provided
 - Attach parking receipts, if any
 - Travel expenditures shall not exceed the district travel rates
 - **Signature of the traveler is required once the Authorization to Travel document has the “Actual Cost” column completed. If any amount exceeds the estimated cost, then the Administrator signature is also required.**
- Return excess funds, if any, within 1 business day of the travel event
- Travelers will be liable for all credit card charges which cannot be substantiated with original, detailed receipts or are not eligible purchases using district funds. A detailed, signed statement by the traveler may be appropriate for minor charges such as a taxi or shuttle. In the absence of either an original, detailed credit card receipt or an acceptable traveler statement, the traveler shall be required to reimburse the credit charges to the district.

STUDENT-OVERNIGHT TRAVEL

The following items are the responsibility of the employee who will be traveling, referred to as the traveler.

Step 1- What the traveler needs to do first - begin a minimum of 3 weeks prior to travel dates:

- Get tentative permission from your supervisor to travel. Overnight Student Travel requires Superintendent approval.
- Review and complete the Travel Card Manual document (required annually). Document is on the district Travel webpage.

Step 2- Gather details & estimates- minimum of 2 weeks prior to travel dates:

- REGISTRATION & ITINERARY
 - Obtain the registration fee, itinerary [Only register if a PO is already in place].
- STUDENT LIST
 - We will require a copy of the roster or the list of students who will be traveling in addition to any other sponsors traveling.
- LODGING- *If staying overnight outside of Tarrant County.* Lodging inside Tarrant County requires Administrator and Chief Financial Officer or designee approval.
 - Print the GSA lodging rate for the destination [this will help you know how much the district will pay toward the lodging].
 - Get an estimate for hotel expense or make a reservation. Traveler can request to use a District travel card for the reservation. If the hotel is going to charge a deposit for the reservation, then a PO will need to be entered before a District Travel card can be issued. If the traveler uses a personal card to reserve the hotel, then the traveler is responsible to update the card used by the hotel at the time of check in.
 - Find out what parking charges the hotel might have.
 - Find out if the hotel provides any meals.
 - Double Occupancy is recommended for Sponsors and Triple Occupancy is recommended for Student rooms.
- MEALS- *If staying overnight outside of Tarrant County.*
 - Meals- you may use the Professional Travel Daily Per Diem & Mileage Estimator. Meals are calculated @ \$51.00 on travel days and \$68.00 on full days per adult traveling less any meals being provided at event.
 - Meals - Daily student meal per diem rates are \$30 broken down as follows: \$5 Breakfast, \$10 Lunch, \$15 Dinner.
 - These are the maximum rates, your administrator may have a more restrictive policy as budget allows.
- MILEAGE
 - Print the first page of the google map from work location to the destination [DO NOT print pages of driving instructions].
 - District vehicle [enter a transportation request to Transportation]
 - District employees are not permitted to transport students in their personal vehicles.
 - Mileage- take the round trip miles and multiply it by the mileage rate of \$0.67 per mile.
 - If taking more than one district vehicle, multiply the total by that amount.
 - If taking a district vehicle will require a bus driver or transportation staff member to drive, then a Driver Trip Fee of \$30.00 will be charged to the travel budget code.
- PARKING
 - Parking- estimate total parking expenses at hotel and event.

- OTHER
 - If airfare is involved, get estimate from preferred airlines [all air travel must be approved by the Superintendent].
 - Other charges such as Uber/Taxi/Rental Car- get estimates.

Step 3- Complete Travel form- minimum of 2 weeks prior to travel dates:

- Complete the Authorization for Travel: Professional or Student Form [found on the web under Business Services/District Travel].

Step 4- Turn in Travel packet- minimum of 2 weeks prior to travel dates:

- Turn in the completed Authorization form and all the backup listed above that you have obtained to your campus/department travel coordinator [Secretary or Bookkeeper].
- Your Travel coordinator will enter a PO Requisition for the registration and a Travel Requisition into Skyward where it will go through the approval process of your supervisor, Business Services, and the CFO [Superintendent, Special Programs, and Asst. Superintendent as needed].

Step 5- Wait for approval

- Once your packet is approved you will receive additional information from Business Services about when the travel packet will be available to be picked up. If you have not already done so, make sure to complete the Travel Card Manual process online.

Step 6- Receive travel items

- You will receive an email with information about when the travel packet will be available to pick up. Usually, the packet will be available one business day before the start of the travel.
- You will be issued an envelope containing a copy of your Travel PO, TCard, hotel tax exemption form, and sales tax exemption form.

Step 7- Travel and enjoy and learn a lot!

- While you are on your trip-
 - Present your hotel occupancy tax exemption form to the hotel at check-in. They will use that form to remove the State Sales Tax from the hotel and parking. If you used your personal credit card to reserve the hotel, you will also need to make sure that they update the card on file to use the district card.
 - Keep your itemized hotel receipt. When you check out, make sure State Taxes have been removed.
 - Keep itemized receipts for all meals. Please make sure to note the amount of the tip if it is not on the itemized receipt. Review the bill before paying and make sure that you are not using the travel card to pay for any items which are not permissible purchases with district funds.
 - Have students sign a sheet stating they received a meal.
 - If you received an advance for meal money, a sheet will be provided for the students to sign.
 - Keep any fuel receipts [only when driving a district vehicle].
 - Keep your certification of attendance [if one is provided].
 - Keep any other receipts of purchases made with TCard [e.g. baggage check receipt, taxi fare, etc.]

Step 8- Return and submit your travel expenses

- **Return complete travel packet to Business Services within one business day. Most campuses/departments will have the traveler submit the items to the secretary/bookkeeper to review and submit to Business Services.**
 - Attach itemized receipts for all transportation (taxis, shuttles, rental cars, etc.)
 - Attach the itemized hotel receipt (State taxes for Texas hotels will need to be refunded or may be deducted from any reimbursement due to employee)

- Attach copy of student meal money receipt form [student signatures for receipt of meals]
- Attach itemized receipts for all meals purchased during travel.
- Attach registration receipt, if provided
- Attach parking receipts, if any
- Travel expenditures shall not exceed the district travel rates
- **Signature of the traveler is required once the Authorization to Travel document has the “Actual Cost” column completed. If any amount exceeds the estimated cost, then the Administrator signature is also required.**
- Return excess funds, if any, within 1 business day of the travel event
- Travelers will be liable for all credit card charges which cannot be substantiated with original, detailed receipts or are not eligible purchases using district funds. A detailed, signed statement by the traveler may be appropriate for minor charges such as a taxi or shuttle. In the absence of either an original, detailed credit card receipt or an acceptable traveler statement, the traveler shall be required to reimburse the credit charges to the district.