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# FISD EMPLOYEE TRAVEL CHECKLIST

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## 1. BEFORE YOU TRAVEL

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- Obtain approval from Campus Principal or Department Director and the Budget Manager funding the travel (if not the same person) before making any travel arrangements.
- The Superintendent must approve all out-of-state travel prior to booking any travel arrangements.
- At least 10 business days prior to traveling, complete the Request for Travel form (in electronic format – see District website/Departments/Business/Forms), which includes the destination, purpose of trip, dates, budget codes, lodging, mileage, meals, parking and other estimated expenses. When sharing a room, be sure to list the employees' names on the travel form. Check the box next to Pre-Travel Approvals. Registration costs should not be included on the travel form. A separate purchase order should be used to pay for registration expenses.
- Save a copy of this form electronically to be updated as the *Final Report* upon return.
- Print, sign and submit the original completed form to the Campus Bookkeeper or Department Secretary for Supervisor and/or Budget Manager approval as required. Upon approval, they will enter the check request into Skyward for prepayment of lodging expenses. All other travel expenses (such as meals, parking, and mileage) will be reimbursed after the trip. If traveling with students, the student and sponsor meals will be advanced prior to travel. After the check request has gone through the electronic approval process, the Business Office will print the check to cover the cost of the lodging and will send it back to the campus or department for distribution to the traveler along with the Hotel Occupancy Exemption Form and the Sales Tax Exemption Form needed for parking.
- Obtain the hotel check, Hotel Occupancy Exemption form and Sales Tax Exemption form before you leave. The District is exempt from Texas state sales tax on hotel rooms and from state sales tax on parking. The District is not exempt from city/room taxes; therefore, those can be prepaid if known or reimbursed upon return.
- If your travel is being funded with state or federal grant funds, review the Friendswood Travel Procedures handout which can be found on the Business Department website for further instructions. Also view this for complete information about meals, mileage, hotel rates, parking, rental cars, and more.

## 2. WHILE YOU ARE TRAVELING

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- Keep all receipts including those for hotel, parking, gas, meals, taxis, rental cars, etc. For most employees, meal receipts are not needed as the District reimburses meals on a Per Diem basis. However, for those individuals whose travel is paid with Federal Funds, detailed/itemized receipts are required for all expenditures, including meals. Per diems for meals are not allowed with Federal Funds. Tolls are not reimbursed.
- Upon hotel checkout, the traveler should request a detailed receipt showing all charges and balances paid. This receipt must be turned in with your final travel report.

## 3. UPON YOUR RETURN

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- Within 15 days of return, the Request for Travel form should be updated (electronically) as the *Final Report* with the actual travel expenses including mileage, parking, taxis, and other approved incidental costs.
- Certify that all meal per diem funds were expended during the authorized job-related travel. This is required because meal per diems are taxable to the employee unless they are completely expended.
- Print, sign and submit the completed Request for Travel – Final Report with copies of all detailed receipts including hotel receipt to the Campus Bookkeeper or Department Secretary for reimbursement. Meal receipts are not necessary unless the travel is being paid with Federal Funds.
- After the check request has gone through the electronic approval process, the Business Office will process the check request for payment. All documentation must be submitted in order for the payment to be processed. Employee reimbursements are deposited via ACH into the same bank account they receive their paychecks. An automatic email is sent by Skyward notifying the employee of the reimbursement.

NOTE: Each District employee and official who is authorized to travel for school business assumes a direct responsibility to limit travel claims to those actually incurred while traveling and representing Friendswood ISD. Likewise, each District official and employee has a responsibility to limit travel to purposes that are clearly essential. Arrangements utilizing the most economical means of accomplishing the authorized travel must be considered. This planning should include consideration of the use of personal car or common carrier, sharing rides with other employees attending the same event, sharing hotel rooms and similar alternatives if appropriate.