

Out of District Travel form Checklist

At least 2 Weeks before Travel

- Secure Conference Registration
- Secure Hotel (get exact cost per room/per night including taxes). Ask about parking charge. Self park or valet parking. Use self parking if available vs valet parking. Also ask if any meals provided.
- Secure Rental Car (Enterprise or BIRD Transportation Dept.-Suburbans (If available on travel dates)
- Secure Airfare (if applicable) This is only eligible for reimbursement if total cost is less than driving.
- If driving- Get mileage from google maps -Refer to the most economical mileage-keep copy of map for reimbursement.

- _____ Fill out left side of travel form with information above.
- _____ Include all that applies-hotel rate, air(if applicable), registration, meals, deductions for meal(s) provided and mileage.
- _____ Include budget account code(s) to charge. If federal or other departments paying, include their codes also.
- _____ Make any Notes in "Additional Comment section", i.e., sharing room, ride sharing, conference is paying for meals, etc
- _____ Forward to Supervisor (button #1 on travel form) for approval.
- _____ Supervisor/Secretary forwards to Director of Business representative -Dora Thrash (button #2 on travel form)
- _____ Dora Thrash will forward final approved travel form to Traveler and cc'd name(s) on travel form. Save/use for reimbursing.
- If **Out of State Travel** – Out of State Travel must be approved by Cabinet at least 60 days prior to the trip.
- Refer to the GSA per diem rate for the states per diem.
- <https://www.gsa.gov/travel/plan-book/per-diem-rates>
- If the city is not listed -use county for the daily rate.
- **Approval**-Supervisor/Secretary forwards to **Cabinet Member for approval** (button #1), Cabinet forwards to Director of Business representative -Dora Thrash
- If Federal fund – Supervisor/Secretary forwards to Tiffany Mendez (button #2a) for approval, Tiffany forwards to Director of Business representative-Dora Thrash for Final approval.
- Dora will send final approved form to the traveler/cc'd name(s) on travel form. Save/use for reimbursement.

#1. Forward Form to Supervised Authority for Approval

#2a. IF FEDERAL OR STATE FUNDS 200-459 ARE BEING USED: SUBMIT to GRANT Dept for PRE-APPROVAL

#2. Submit APPROVED Form to Director of Business

- _____ Receive copy of approved travel form and save. (Use as attachment for PO & check requests).
- _____ Enter a purchase order for conference registration.
- _____ Print copy of Hotel State Tax Exempt form and give to traveler.
- _____ Print copy of Texas Sales & Use Tax Exempt form and give to traveler. (for parking)

After Travel Checklist

- _____ Open copy of approved travel form.
- _____ Fill in "Prior Trip Payments" *column*- **District paid**-Before/during travel (amount as on receipts).
- _____ Fill in "Post Trip Payments" *column*- **Employee paid**- Amounts to be reimbursed to traveler.
- _____ Submit check request for total reimbursement
- _____ Attach backup to request for check. In order of travel form listed.

BACK UP: Hotel invoice, Air travel (if applicable), Registration, Car rental billing, parking, taxi/or Uber (15% MAX tip) and any other expenses that will be reimbursed will require backup. Also Proof of Attendance of Conference attended. **For more information regarding travel, please refer to the District's Travel Guidelines web page under Staff resources.**