

INSTRUCTIONS FOR SUBMITTING TRAVEL REQUEST

This request must be turned in to your campus principal or department supervisor & a **Check Request** submitted in TEAMS at least 10 days in advance of the travel. Actual expenses are to be completed after the travel occurs.

The steps for travel approval have changed.

Please be sure to follow the steps listed below so that your travel payments are not delayed.

1. The employee completes the general information & "Estimated Expenses" portions of the form.
2. The employee must call the Transportation Department (281-577-8680) to schedule the use of a district vehicle.
****You MUST have a valid Texas Driver's License to drive a district vehicle****
 - If a district vehicle is available, write the district vehicle number on the travel request form.
 - o New Caney ISD fuel credit cards must be used and are available at the Transportation Dept. between the hours of 5am – 6pm. In the event that a district car is used for the travel and fuel must be purchased by the employee, an itemized receipt **must** be submitted for reimbursement.
 - If a district vehicle **is not available**, please write "**No Vehicle Available**" on the travel form. **You must include the email from Transportation stating that there was no district vehicle available. Your mileage reimbursement WILL NOT be approved without this.**
 - If a district vehicle **is available**, but you choose to drive your own vehicle, please write "**Personal Vehicle by Choice**" on the travel form. The district **WILL NOT** reimburse mileage, unless prior approval by the Superintendent or designee.

If the trip is canceled, call the Transportation Department to cancel the use of the vehicle.

MILEAGE/FUEL COST

MILEAGE REIMBURSEMENT RATE: If a district vehicle is **not available** and the employee must use their own vehicle, the district will reimburse the employee at the approved rate published by the state comptroller found at: (<https://fm.xcpa.state.tx.us/fm/travel/milerate/index.php>). You may use the chart below or www.mapquest.com or a similar program to determine the mileage. Please attach a copy of the web page that shows the addresses and mileage.

Use: 21580 Loop 494, New Caney, TX 77357 as your beginning location.

STANDARDIZED MILEAGE: (Distances listed are complete round trip miles)

Region VI (Huntsville): 104

Region IV (Houston): 72

HCDE: 52

3. If hotel reservations are needed, contact the hotel and reserve the room(s). Determine if other district employees are making hotel reservations for the same event. Maximum hotel rates are determined by the GSA Chart. Go to www.gsa.gov and follow the "Per Diem Rates" link and select the state that your travel is in. If neither the city nor the county is listed on the GSA Chart, the maximum rate will be the Standard rate as listed on the GSA Chart. A travel Expense Justification form **must** be attached if hotel cost exceeds the maximum GSA rate.
Hotel Arrangements Guidelines & Exceptions
Traveling alone (No other NCISD employee attending the same event):
 - Make travel arrangements as stated in this packet.Traveling to events where other NCISD employees will also be attending:
 - One day (no hotel stay) or multiple days in the local area:
 - o Secure a school vehicle (if available) and carpool together.
 - o If no school vehicle is available: Carpool in personal vehicle.
 - Two or more days with hotel stay:
 - o Each employee shall have their own room unless it is mutually agreed upon to share the room.
 - o Each employee shall receive the maximum lodging rate on the GSA schedule. Each traveler shall submit a travel voucher for their portion of the lodging costs.
4. Estimate expenses for: parking, taxi, or unusual expenses
5. Meal expenses are based upon the CONUS rates found at www.gsa.gov, with the following guidelines:
 - Meals shall not be reimbursed for travel that is for a single day. Only overnight trips shall receive meal reimbursement.
 - The daily rate for meals will follow the CONUS rates for the city of destination.
 - o Meal reimbursement for day of travel will be 75% of daily rate if leaving before noon.

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- o Meal reimbursement for day of travel will be 50% of daily rate if leaving NC after noon or arriving back to NC before 6pm.
 - Itemized receipts for meals are not required to be turned in, although reimbursement for meals is for the **actual meal expenses**. Do not just write in the GSA rate for each day since itemized receipts should be kept by the employee for local audit purposes of actual meal expenses.
 - Tips and alcoholic beverages are not reimbursed. After your travel and when completing the “Actual Expenses” portion of the travel form, you will list your **actual meal expenses** for each day up to GSA rate. (**Actual meal expense** is total of meal minus tip and alcoholic beverage)
 - **When reimbursed with Federal Funds (Title I, Title II, Title III, Title IV, Perkins, IDEA) meeting/conference agendas must be attached to meal reimbursement form. The district will not reimburse for meals provided by meeting/conference. (Dietary restrictions will be taken into consideration.) Separate meal rates will follow published CONUS rates.**
 - The District does not advance funds for meals.
6. After the completion of the “Estimated Expenses”, the employee submits the original Travel Request form to the campus/department administrator for signature/approval of estimated expenses.
 7. After the campus/department approval is obtained, the secretary or bookkeeper processes a “**Check Request**” in TEAMS for the hotel and/or registration. The campus/department must attach the Travel Request Form and all backup information (Hotel Confirmation, GSA Rate Confirmation, Conference Agendas, Registration Information, and if necessary the MapQuest printout) to the Check Request in TEAMS.
 8. After approvals have been given in TEAMS the checks will be processed by the Accounts Payable Department. Registration fees are mailed as soon as the check is ready. The hotel check is cut later (prior to travel date). The hotel check is sent back to the campus. Contact the Accounts Payable Department if you need to request special arrangements. *Summer travel checks will be held in Accounts Payable.*

*****Employee must pick-up keys and gas card from the Transportation Department. *****

9. After the travel is completed; the campus/department secretary will provide the employee a copy of the Travel Request form in order for the employee to complete the “Actual Expenses”.
 - ORIGINAL ITEMIZED RECEIPTS FOR FUEL ARE REQUIRED. A CREDIT CARD RECEIPT IS NOT CONSIDERED AN ITEMIZED RECEIPT.
 - o **Reimbursement will not be made if original/itemized receipts are not provided.**
10. The Employee submits the “Actual Expenses” with the itemized receipts (if required) to the campus administrator for original signatures & approval of actual expenses.
11. The campus secretary shall input a “Create Employee Advance/Reimbursement Request” in TEAMS and attach a copy of the Travel Request form with the Actual Expenses portion completed along with a copy of all receipts and agendas. **You MUST include some type of proof of attendance (copy of attendance badge, agenda, handouts, etc. will be acceptable).** Accounts Payable will cut the reimbursement check once all approvals are completed in TEAMS and required documentation is attached.

12. Travel – Federal Guidelines section

NCISD shall expense direct travel costs for expenses for transportation, lodging, subsistence, and related items incurred by employees who are on official business for the district. Such costs as detailed in Title 2 CFR 200.474 will be charged on an actual cost basis for the entire expense. Travel costs documentation must justify that:

- Participation of the individual is necessary to the Federal award
- Costs incurred by district employees and officers for travel must be considered reasonable and otherwise allowable and are consistent with the ESC’s established travel policy.
- Agendas for meeting/conference must be attached to meal reimbursement request.
- The costs are a direct result of the individual’s travel for the Federal award.
- Travel costs for dependents are unallowable
- Airfare costs in excess of the basic least expensive unrestricted accommodations class offered by commercial airlines are unallowable except in a few exceptions dealing with airline issues out of the control of the employee (see 2 CFR 200.474 for further details)

The district shall reimburse travel as set out in Business Support Procedures 3.2 recording the specific costs charges to the grant as per the approved application.

NEW CANEY INDEPENDENT SCHOOL DISTRICT

REQUEST TO ATTEND / EXPENSE SHEET FOR **EMPLOYEE** TRAVEL

Name: _____ Campus: _____ Date Submitted: _____

Departure Date: _____ Time: _____ Return Date: _____ Time: _____

Destination: _____ Description of Meeting: _____

Campus Improvement Plan activity target objective: _____

Staff / Department that will benefit from info gained from this travel: _____

ESTIMATED EXPENSES:

School Car: Yes No

Call the Transportation Dept to reserve a district vehicle.

Car # _____

Traveling with others: Yes No List names: _____

	Day 1	Day 2	Day 3	Day 4	Day 5	Total	
Meals:						=	Use GSA.gov website for destination hotel and meal rates.
Meal rates from GSA (including IE): Full Day=100% Departing: before 12pm=75%, after 12pm=50%; Returning before 6pm=50%							

Personal Car Mileage: _____ @0.655 /mile Total = _____

Hotel: ___ Day(s) @ _____ a night City Tax Total = _____

(GSA Rate Yes No)

Registration: _____ Total= _____

Other: _____ Total= _____

Estimated cost of travel: _____

Employee Sign: _____ Date: _____

Approval:

Principal / Supv: _____ Date: _____

DO NOT COMPLETE ACTUAL EXPENSES UNTIL AFTER TRAVEL

Actual Expenses:

NO REIMBURSEMENT IF MEAL IS PROVIDED

	Day 1	Day 2	Day 3	Day 4	Day 5	Total	
Meals:						=	

Personal Car Mileage: _____ Miles @ (0.655/mile) Total = _____
(Itemized Receipts Required)

Other: (Specify. No tolls reimbursed – included in mileage reimbursement) Total = _____

Actual Reimbursement To Employee: Total =

Approval:

Employee Sign: _____ Date: _____ Principal / Supv: _____ Date: _____

Budget Code(s): _____ Employee Vendor # _____

(If Multiple Budget Codes: List amounts for each code)


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Texas Hotel Occupancy Tax Exemption Certificate

Provide completed certificate to hotel to claim exemption from hotel tax. Hotel operators should request a photo ID, business card or other document to verify a guest's affiliation with the exempt entity. Employees of exempt entities traveling on official business can pay in any manner. For non-employees to be exempt, the exempt entity must provide a completed certificate and pay the hotel with its funds (e.g., exempt entity check, credit card or direct billing). This certificate does not need a number to be valid.

Name of exempt entity	Exempt entity status (Religious, charitable, educational, governmental)
Address of exempt organization (Street and number)	
City, State, ZIP code	

Guest certification: I declare that I am an occupant of this hotel on official business sanctioned by the exempt organization named above and that all information shown on this document is true and correct. I further understand that it is a criminal offense to issue an exemption certificate to a hotel that I know will be used in a manner that does not qualify for the exemptions found in the hotel occupancy tax and other laws. The offense may range from a Class C misdemeanor to a felony of the second degree.

Guest name (Type or print)	Hotel name
 Guest signature	Date

Exemption claimed

Check the box for the exemption claimed. See Rule 3.161: Definitions, Exemptions, and Exemption Certificate.

- United States Federal Agencies or Foreign Diplomats.** Details of this exemption category are on back of form. This category is exempt from state and local hotel tax.
- Texas State Government Officials and Employees.** (An individual must present a Hotel Tax Exemption Photo ID Card). Details of this exemption category are on back of form. This limited category is exempt from state and local hotel tax. Note: State agencies and city, county or other local government entities and officials or employees are not exempt from state or local hotel tax, even when traveling on official business.
- Charitable Entities.** (Comptroller-issued letter of exemption required.) Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.
- Educational Entities.** Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.
- Religious Entities.** (Comptroller-issued letter of exemption required.) Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.
- Exempt by Other Federal or State Law.** Details of this exemption category are on back of form. This category is exempt from state and local hotel tax.

Permanent Resident Exemption (30 consecutive days): An exemption certificate is not required for the permanent resident exemption. A permanent resident is exempt the day the guest has given written notice or reserves a room for at least 30 consecutive days and the guest stays for 30 consecutive days, beginning on the reservation date. Otherwise, a permanent resident is exempt on the 31st consecutive day of the stay and is not entitled to a tax refund on the first 30 days. Any interruption in the resident's right to occupy a room voids the exemption. A permanent resident is exempt from state and local hotel tax.

Hotels should keep all records, including completed exemption certificates, for four years.

Do NOT send this form to the Comptroller of Public Accounts.

Texas Hotel Occupancy Tax Exemptions

See Rule 3.161: *Definitions, Exemptions, and Exemption Certificate* for additional information.

United States Federal Agencies or Foreign Diplomats (exempt from state *and* local hotel tax)

This exemption category includes the following:

- the United States federal government, its agencies and departments, including branches of the military, federal credit unions, and their employees traveling on official business;
- rooms paid by vouchers issued by the American Red Cross and the Federal Emergency Management Agency; and
- foreign diplomats who present a Tax Exemption Card issued by the U.S. Department of State, unless the card specifically excludes hotel occupancy tax.

Federal government contractors are *not* exempt.

Texas State Government Officials and Employees (exempt from state *and* local hotel tax)

This exemption category includes only Texas state officials or employees who present a Hotel Tax Exemption Photo Identification Card. State employees without a Hotel Tax Exemption Photo Identification Card and Texas state agencies are *not* exempt. (The state employee must pay hotel tax, but their state agency can apply for a refund.)

Charitable Entities (exempt from state hotel tax, but *not* local hotel tax)

This exemption category includes entities that have been issued a letter of tax exemption as a charitable organization and their employees traveling on official business. *See website referenced below.*

A charitable entity devotes all or substantially all of its activities to the alleviation of poverty, disease, pain and suffering by providing food, clothing, medicine, medical treatment, shelter or psychological counseling *directly* to indigent or similarly deserving members of society.

Not all 501(c)(3) or nonprofit organizations qualify under this category.

Educational Entities (exempt from state hotel tax, but *not* local hotel tax)

This exemption category includes in-state and out-of-state school districts, private or public elementary, middle and high schools, Texas Regional Education Service Centers and Texas institutions of higher education (*see Texas Education Code Section 61.003*) and their employees traveling on official business.

A letter of tax exemption from the Comptroller of Public Accounts as an educational organization is not required, but an educational organization might have one.

Out-of-state colleges and universities are *not* exempt.

Religious Organizations (exempt from state hotel tax, but *not* local hotel tax)

This exemption category includes nonprofit churches and their guiding or governing bodies that have been issued a letter of tax exemption from the Comptroller of Public Accounts as a religious organization and their employees traveling on official business. *See website referenced below.*

Exempt by Other Federal or State Law (exempt from state *and* local hotel tax)

This exemption category includes the following:

- entities exempted by other federal law, such as federal land banks and federal land credit associations and their employees traveling on official business; and
- Texas entities exempted by other state law that have been issued a letter of tax exemption from the Comptroller of Public Accounts and their employees traveling on official business. *See website referenced below.* These entities include the following:
 - nonprofit electric and telephone cooperatives,
 - housing authorities,
 - housing finance corporations,
 - public facility corporations,
 - health facilities development corporations,
 - cultural education facilities finance corporations, and
 - major sporting event local organizing committees.

For Exemption Information

A list of charitable, educational, religious and other organizations that have been issued a letter of exemption is online at www.window.state.tx.us/taxinfo/exempt/exempt_search.html. Other information about Texas tax exemptions, including applications, is online at www.window.state.tx.us/taxinfo/exempt/index.html. For questions about exemptions, call 1-800-252-1385.



TRAVEL EXPENDITURE JUSTIFICATION

The following form must be completed by you and your supervisor if your hotel expenditure is above what is allowed on the GSA chart.

Date Requested: _____ Date(s) of Conference Training: _____

Purpose of school business trip: _____

Justification of charges exceeding the maximum allowed: _____

Budget code for expenditure: _____

Employee Signature

Date

Supervisor Signature

Date

Superintendent or Designee Signature

Date