

COMPENSATION AND BENEFITS
EXPENSE REIMBURSEMENT

DEE
(LOCAL)

PRIOR APPROVAL
REQUIRED

An employee shall be reimbursed for reasonable, allowable expenses incurred in carrying out District business only with the prior approval of the employee's immediate supervisor.

TRAVEL EXPENSES

Reimbursement for authorized travel shall be in accordance with legal requirements.

Accounting records shall accurately reflect that no state or federal funds were used to reimburse travel expenses beyond those authorized for state employees.

DOCUMENTATION
REQUIRED

For any authorized expense incurred, the employee shall submit a statement, with receipts to the extent feasible, documenting actual expenses and in accordance with administrative procedures.

~~EXPENSE
REIMBURSEMENTP~~

~~Each employee of the District shall be reimbursed for expenses incurred while performing duties related to his or her job when such expenditures are approved by the employee's supervisor and the business office. Prior approval for all expenditures must be obtained before any expenses are incurred. Pre-payment is an option.~~

~~Reimbursement for authorized travel shall be in accordance with legal requirements. Accounting records shall accurately reflect that no state or federal funds were used to reimburse travel expenses beyond those authorized for state employees.~~

~~Any request to attend a meeting or other school-related activity that requires the absence of the employee from regularly assigned duties must be submitted to the employee's supervisor for approval prior to the absence. The travel advance and expense report (TAER) is used for requesting funds when employees travel.~~

~~Advance payment for all normal overnight expenses can be made directly to the employee before the trip provided the TAER is submitted to the business office ten working days prior to departure or the prepayment deadline.~~

~~Reimbursements for expenses may be requested provided the TAER is submitted to the business office five working days prior to departure.~~

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~~The TAER form must include all required information.~~

~~ATTENDANCE
GUIDELINES~~

~~Authorization to travel may be granted to employees for one of the following purposes:~~

- ~~1. District business – any meeting at which attendance of the employee is required by the District.~~
- ~~2. Professional development – any meeting at which attendance of the employee is optional; i.e., attendance is at the request of the employee but is not required. Personnel are eligible to attend meetings for professional development activities as follows:~~
 - ~~a. Central staff personnel~~
 - ~~(1) Executive directors~~
 - ~~– A regional meeting every year~~
 - ~~– A meeting outside the region each year~~
 - ~~(2) Directors~~
 - ~~– A regional meeting each year~~
 - ~~– A meeting outside the region every other year~~
 - ~~(3) Coordinators~~
 - ~~– A regional meeting each year~~
 - ~~– A meeting outside the region every other year~~
 - ~~b. Campus administrators~~
 - ~~(1) Principals~~
 - ~~– A regional meeting each year~~
 - ~~– A state summer workshop every year~~
 - ~~– A meeting outside the region every fifth year~~
 - ~~(2) Assistant Principals~~
 - ~~– A regional meeting each year~~
 - ~~c. Other professional staff~~
 - ~~(1) Professional workshops, conferences, or conventions within the region that directly relate to job~~

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~~competencies as approved by the staff member's
organizational manager.~~

~~A regional meeting is defined as a meeting in Texas or Louisiana.~~

- ~~3. Special requests – any meeting not covered under 1 and 2 above, or meetings where the employee is an officer of the sponsoring organization or an invited program participant.~~

~~All special requests must be approved by the organizational manager prior to making plans to attend the meeting.~~

~~FUNDING~~

~~Funding for school-related travel is furnished through the annual budget process. It is the responsibility of the organizational manager to determine, with input from the staff, an equitable procedure to follow in the allocation of funds for travel to professional meetings. Teachers assigned to more than one building are subject to the procedures established in their "home school."~~

~~SCHEDULE FOR
REIMBURSEMENT~~

~~Reimbursement for expenses incurred while attending school-related meetings shall be limited to the amounts shown in the appropriate section below. Items of a personal nature such as snacks, newspapers, and the like, are not reimbursable. A long distance call may be made to a spouse to acknowledge safe arrival. When the actual expenses incurred will be less than the authorized rate, the employee shall be reimbursed only for the lesser amount. It is the employee's responsibility to maintain all records for reimbursement.~~

~~The following shall apply for reimbursement for District business or professional development:~~

- ~~1. Transportation – personal automobile use at the amount allowed by current IRS regulations or coach fare (receipt required). School-owned vehicles should be used whenever available.~~
- ~~2. Approved mileage from Orange to various points in Texas and Louisiana – available from the organizational manager. Mileage not listed must be obtained from the business office.~~
- ~~3. Lodging – actual expenses (receipt required).~~
- ~~4. Meals – the amount allowable under current IRS geographical rates (23 percent of this amount for breakfast, 32 percent for lunch, and 45 percent for dinner).~~
- ~~5. Expenses for banquets or luncheons which are a part of the official program – will be paid in lieu of the reimbursement for that particular meal. To receive the full per diem allocation the~~

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~~employee must depart prior to 7:00 a.m. and return after 7:00 p.m.~~

- ~~6. Registration - actual expenses (receipt required unless pre-paid) which may not include the cost of membership in the hosting organization, but which may include any additional expenses directly related to the meeting that may be a part of the registration fee.~~
- ~~7. Miscellaneous - parking, tolls, ground transportation, and the like, based on actual expenses for which receipts should be provided when available. When receipts for these expenditures are not obtainable, the expenditures must be itemized and attached to the yellow settlement form.~~
- ~~8. Local mileage reimbursement - employees must recover their travel expenses on a direct reimbursement basis. Official travel mileage must be logged on a travel report (form BUS-025) and submitted to the business office each month. The exact miles traveled may be logged or the District's mileage chart may be used.~~

~~The standard mileage rate for use of private vehicles on official business is the amount allowed by current IRS regulations per mile and should be reported on TAERs as well as the BUS-025. Official mileage reimbursement charts shall reflect this rate. The supervisor shall approve the number of vehicles going on any trip.~~

~~TAERs need not be completed for travel of less than a full day if the only expense to be claimed is automobile mileage and meals. The mileage and meal expense can be filed at the end of the month on a BUS-025. For overnight travel, a TAER should be completed and submitted for approval early enough that it reaches the business office ten working days in advance of the meeting date or prepayment deadline.~~

PROCEDURES

~~The procedures to be utilized in obtaining approval for requested school-related travel and subsequent reimbursement are as follows:~~

- ~~1. For employee travel, the TAER is to be completed by the employee, approved by the supervisor, and forwarded to the business office. Special funding program shall need approval by the program director.~~
- ~~2. The settlement form (yellow copy of the TAER) must be in the business office five business days after the trip even if there is no reimbursement involved. All TAERs must be accounted for after each trip~~