

2023

Kyrene Travel Procedure Handbook

KYRENE SCHOOL DISTRICT
BUSINESS SERVICES DEPARTMENT

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The Kyrene School District is committed to continuous learning and encourages on-going professional development as well as opportunities for student competition and learning experiences. At times, this requires travel within or out of state. The forms and procedures necessary for travel are located below. The Kyrene Elementary School District adheres to the State of Arizona Accounting Manual Travel Policy as set forth by the Arizona Department of Administration, General Accounting Office.



Please review this document in its entirety and complete the appropriate forms to submit to your supervisor for approval prior to travel. TRAVELER RESPONSIBILITIES—READ THIS

General Travel Information

When district travel is approved, the most economical means should be selected.

Approval Prior to Travel

No travel arrangements or commitments are to be made until appropriate approvals are obtained.

A [Travel Pre-Approval Form](#) should be signed and approved by the Department requesting the travel. It must be attached to all travel claims.

An [Out of State Travel Pre-Approval](#) needs Governing Board Approval prior to travel. Submit to Business Services at least 45 days in advance to be added to the Board Agenda.

To be eligible for reimbursement of meals & lodging, employees must be at least 50 miles from their duty post and personal residence.

Travel Status

To be in travel status, a traveler must be more than fifty (50) miles from both their residence and regular work site.

Please Keep Receipts

Where receipts are required, please submit the original detailed receipts showing payment in full with your claim. Please keep a copy for your own records.

Submit your Claim in a timely manner

Travel claims should be submitted within five days after the return of travel, but no later than 60 days after travel is completed (prior to June 30th).

For employees who are normally reimbursed for in-district travel, claims should be submitted at least monthly, but no later than 60 days after travel is completed. Please note, travel claims filed beyond the designated filing deadlines may not be eligible for reimbursement.

Fill out your claim forms completely, and provide all required back-up documentation

Mileage reimbursement is to be included on the travel reimbursement form at the rate of 62.5 cents per mile, and odometer readings, dates and times must be submitted on the form.

All travel claims must indicate the time and place travel begins and ends, odometer readings (if applicable) and both employee and authorized signatures.

Submit the original receipts for all the expenses for which you are claiming reimbursement.

Submit conference or meeting brochures that provide an itemized listing of the activities to determine which meals are included as part of the conference fees.

A hard copy of electronic receipts is acceptable, provided that the detail contained within the document is equivalent to the level of detail contained in an acceptable original paper record.

Travel Forms

**Please deliver or mail completed forms to Business Services Mail Stop 1A.
Fax 480-541-1814 or 480-541-1837**

[Traveler Responsibilities IMPORTANT.pdf](#)

[Travel Pre-Approval Document - PDF](#)

[Travel Expense Form - Excel Format](#)

Mileage Reimbursement

The State-approved mileage rate is 62.5 cents per mile.



Guidelines for Calculating Mileage for Reimbursement:

- Use this [Mileage Claim Form with Calculator 2023](#) to submit mileage for reimbursement. This form is for both in-district and out of district mileage submission. Please use the appropriate tab and follow the instructions included within the spreadsheet.
- When calculating Out-of-District mileage, be sure to use [Google Maps](#) to verify mileage.
 - Include the address of your location if it is not one of the District's schools and attach a copy of the Google Map showing the shortest mileage with your claim form.
- The mileage reimbursement rate has been calculated to cover all automobile expenses such as fuel and oil, towing charges, repairs, replacements, tires, depreciation and insurance.
- Commuting **miles are not reimbursable** -- The cost of commuting between a personal residence and a regular work site is not reimbursable, regardless of the distance.
- When **choosing to drive to trainings or conferences more than 20 miles** from the employee's worksite, every effort should be made to secure a **District fleet vehicle** and carpool, if appropriate.

Meal Reimbursement

General Information:

1. Travelers will be reimbursed for no more than three (3) meals per day.
2. Meal reimbursement will be for the actual cost of the meal not to exceed the meal allowance. Itemized receipts **are** required (no credit card copies).
3. Meal reimbursement allowance amounts are determined by the State of Arizona. [Click here for Meal Allowances by City](#) (updated 01/09/2023)
4. In order to be reimbursed for a meal, the meal must contain enough edible selections with which to construct a meal. Light snacks such as a coffee and muffin do not constitute a meal.
5. If a traveler has special dietary needs, it is their responsibility to make, on a timely basis, the necessary arrangements for such special meals.
6. When tipping at a restaurant, a normal tip should be from 15% to 20%. If an employee wishes to tip more than 20%, it will be considered a personal non-reimbursable expense. Tips are considered a part of the meal per diem.
7. If transportation is needed to obtain a meal, the cost of the transportation and related tip reduce the amount available for meal reimbursement.
8. A traveler is only eligible for reimbursement of a meal when it is consumed in travel status, at least 50 miles from their work site and home, and they are in travel status for at least six (6) hours that day.
9. If an eligible meal is purchased and the travel does not include an overnight stay, the reimbursement is taxable.

Meals at Conferences:

Reimbursements for meals during the conference in excess of the maximum individual meal rate may be allowed when **both** of the following conditions are met:

- The charge for the meal is not included in the conference fees AND
- The meal features a speaker, formal panel discussion or other activity integral to the purpose of the conference.

Allowable / Non-Allowable Meal Reimbursement:

1. Travelers may only purchase meals for themselves. Reimbursement will not be made for other travelers, friends, family, etc.
2. Reimbursable meals may not be consumed within 50 miles of home or work site.
3. Alcohol is **not** reimbursable.
4. When meals are provided to the traveler at no expense, they may not claim reimbursement on those meals. (This includes meals provided by the hotel, conference, or airlines.)
5. Light snacks are **not** considered a reimbursable meal. Example: A coffee and cookie or muffin is a non-reimbursable snack.
6. On the **day of departure** and the **day of return**, the traveler shall be entitled to **meal reimbursements up to seventy-five percent (75%)** of the Full-Day Meal Reimbursement for the trip's destination location. This 75% limitation applies no matter the times of departure or arrival, the length of the travel day, or the number of meals purchased and consumed. *(updated and effective for travel after 1/2/2019)*

Lodging & Conference Information



General Information

The actual daily room charge you will be reimbursed is limited to the maximum lodging reimbursement rate [\[click here for Lodging Per Diems--updated 01/09/2023\]](#) according to the city. The maximum lodging amount to be reimbursed includes room charge, and fees charged at the discretion of the facility (i.e., parking, resort fees), up to the allowable Per Diem amount. Service charges that are incurred at the discretion of the traveler are not reimbursed. Business calls, fax and copy charges, as well as internet connect charges - *if necessary for District business* - are reimbursable.

Example: *If Maximum Lodging Reimbursement Rate (Per Diem) is \$100 per night + taxes*

Example 1

\$100 Hotel room per night
10 taxes (not included above)

\$110 reimbursed by District

\$ 20 parking
10 resort fees

\$ 30 non-reimbursable (above Per Diem)

Example 2

\$ 80 Hotel room per night
15 parking

5 resort fees

\$100 total room charge and fees

7 taxes on room (not included above)

\$107 reimbursed by District

Additional room features, special accommodations and personal expenses charged to the room are not reimbursed.

The lodging establishment must be at least 50 miles from your home and work site to be reimbursable.

Lodging receipts must be itemized and include the name, address and telephone number of the establishment.

Lodging rates are per person. Where feasible, the District strongly encourages shared rooms. When lodging is shared, reimbursement per person should not exceed the amount allowable per person at the single room rate plus tax.

****If sharing accommodations, please ask the hotel to split the bill and charge each employee's credit card separately to submit individually for reimbursement.**

Conference Lodging

The only exception to the per diem lodging rate reimbursement maximum is when an employee is staying at a "conference-designated hotel". Proof that the lodging is indeed "conference-designated" must be attached to your Travel Expense Claim Form or you may be responsible for any charges above the per diem rate.

Conference designated lodging includes lodging at the hotel at which the conference is being held or other hotels listed in the conference brochure. Accommodations at alternate hotels in the immediate vicinity of the conference may be considered as conference-designated lodging when no vacancies exist at the hotels listed in the conference brochure. However, reimbursement for lodging may not exceed the least expensive single room rate plus tax, **regardless of availability**, as published in the conference brochure. A copy of the conference brochure must be submitted with the travel claim to support the reimbursement.

Transportation Information

Conference Transportation

When more than one employee will be attending the same conference, every effort should be made to carpool or use a District-provided vehicle. Please be aware that **the most economical travel option will be reimbursed.**

Airport Parking

Phoenix Airport parking will be reimbursed, with an original receipt, up to \$6.50 per day. See [Airport Parking Rates](#) for additional options. An employee may park wherever he finds it convenient to do so but will only be reimbursed the lesser of the actual amount incurred or six dollars and fifty cents (\$6.50) per day base parking charges.

Car Rental

Use of rented vehicles shall be limited to instances where it is to the advantage of the District, and not for personal convenience of the traveler. Car rental is subject to prior approval. Car rentals must be secured and paid for with the traveler's personal credit card. The traveler must have a valid driver's license and appropriate auto insurance.

The following criteria is used for out-of-state vehicle rental:

Length of Travel	# of Travelers	Size of Rental Vehicle
less than a week	1 - 2 individuals	compact
less than a week	3 individuals	intermediate (mid-size)
more than a week	2 - 3 individuals	intermediate (mid-size)

In State / Out of State Travel Info

General Information:

- To be eligible for reimbursement of meals and lodging, employees must be at least 50 miles from their work site and personal residence, and travel must include an overnight stay.
- A request for authorization to travel must be made using the [Travel Pre-Approval Form](#), signed by your supervisor and submitted to Business Services *no less than 20 days* prior to travel.
- An [Out of State Travel Pre-Approval](#) must be submitted to the Governing Board prior to travel, when applicable.
- A Purchase Order must be submitted, in the name of the traveler, for estimated reimbursable expenses, prior to travel.
- For Professional Growth and Development travel, a purchase order requisition must be submitted with a completed [Travel Pre-Approval Form](#) and conference brochure attached.
- Upon your return, copies of the following must be submitted for reimbursement:
 - copies of all travel-related Purchase Orders
 - flight itinerary
 - original detailed receipts (including meals, hotel, shuttle/taxi, etc.)
 - conference registration
 - conference brochure
 - travel pre-approval form
- **Travel should be conducted as economically as circumstances reasonably permit**, per the Arizona State Travel Policy, Section 6, Policy 5.
- **If you are considering driving**, every effort should be made to secure a District fleet vehicle. Please be aware that the most economical travel option will be reimbursed.

Travel FAQs

Q) Besides pack, what else do I need to do before I travel?

A) Complete a Travel Pre-Approval Form with your supervisor's signature, and submit all appropriate travel-related Purchase Orders, including a PO to reimburse the traveler for any travel expenses incurred. A copy of the Travel Pre-Approval must be attached to all travel-related POs.

Q) I'm not hungry in the morning. Can I be reimbursed for a latte and a muffin?

A) No. This is considered a light snack and not a reimbursable meal.

Q) Should I keep my receipts for reimbursement?

A) Yes! Original, detailed receipts should be submitted with the claim for reimbursement. Keep personal copies until after you have received your reimbursement.

Q) Is alcohol a reimbursable expense?

A) No.

Q) Are tips to servers reimbursable?

A) Yes, up to 20% of the meal total, within the allowable meal reimbursement rate.

Q) There are no restaurants near my hotel. Can I be reimbursed for transportation costs to obtain a meal?

A) Yes, however the meal reimbursement rate includes the cost of the meal, tax, tip, and the cost of transportation between places of lodging. Additional transportation is applied to the allowable amount for meal reimbursements.

Q) If my colleague and I share a hotel room, can the lodging per diem be exceeded?

A) Yes, but not to exceed twice the per diem. If the allowable per diem is \$75, you may share a \$150 hotel room.

Q) Is hotel parking a reimbursable expense?

A) Maybe, but it depends on the hotel lodging rate paid versus the allowable rate. Please confer with Business Services prior to traveling.

Q) My conference is in Tucson. Can I drive my own vehicle and get reimbursed for mileage?

A) Yes. Mileage is reimbursed at 62.5¢ per mile. You may also reserve and drive a district-owned vehicle.

Q) I may need to rent a car when I get to my destination. Is that a reimbursable expense?

A) Yes, however, please call the Business Services department for detailed information.

Q) Who comes up with all these rules, anyway?

A) Arizona School Districts must follow the State of Arizona Travel Policy as established by the Arizona Department of Administration – General Accounting Office.

Q) I find this incredibly fascinating! Where can I get more information?

A) On the Kyrene website; Departments, Business Services, Travel. Enjoy!

TRAVEL EXPENSE INSTRUCTIONS

Travel expense claim forms must be signed by the traveler and traveler's supervisor and must include appropriate account funding code.

The following **must** be submitted with travel claim:

- ✓ Copy of the Travel Approval Documentation
- ✓ Copy of Purchase Order for reimbursement
- ✓ Copy of all Purchase Orders for the related travel
- ✓ Copy of flight itinerary, if applicable
- ✓ Copy of conference brochure that includes the name of conference, conference date/dates and conference designated hotel/hotels with lodging rates
- ✓ Original, itemized hotel receipt
- ✓ Original, detailed meal receipts
 - Alcohol is not reimbursable
 - Gratuity up to 20% of the pre-tax meal cost is reimbursable and considered part of the cost of the meal (not to exceed meal allotment).
 - Reimbursable meal is not a light snack (example: coffee & muffin).
 - Reimbursement will only be provided up to the amount authorized by the Auditor General through the per diem chart. The traveler is not entitled to a meal allowance if meals are provided during the conference.

Reimbursement for lodging and meals may not exceed the amount set forth by the Office of the Auditor General. The exception for this allows for lodging at a conference hotel.

Hard copies of all claims should be submitted to Accounts Payable within 5 – 10 days after return. Claims must be submitted within two (2) calendar months of travel, or are considered delinquent.

Please email travel@kyrene.org for assistance.

Additional information may also be found at <http://www.kyrene.org/Page/28778> and http://www.gao.az.gov/publications/SAAM/Supp_I_trvrates-012308.pdf



BUSINESS TRAVEL CHECKLIST

PRIOR TO TRAVEL

- A **Travel Pre-Approval Document** must be completed with all necessary approval signatures and funding source, and a copy be submitted to Business Services at least 20 days prior to travel.
- An **Out of State Travel Pre-Approval** form must be submitted to the Governing Board for acceptance at least 30 days prior to traveling outside of Arizona.
- Attach the **completed Travel Pre-Approval** form to ALL travel-related Purchase Requisitions before submitting. **Do not make reservations prior to receiving a Purchase Order number.**
- Submit a Purchase Requisition for **estimated reimbursable expenses**, made out to the Traveler. This encumbers funds prior to travel. Attach a copy of the Travel Pre-Approval Form.
- Print out hard copies of flight itinerary, conference brochure, travel-related Purchase Orders and any relevant documents to include with your claim.
- Review the Travel FAQs on the Travel Webpage (Departments/Business Services/Travel) for general guidelines

UPON YOUR RETURN

- Complete your Expense Claim Form (with signatures / funding source). An Excel version is available on the Departments/Business Services/Travel website, under Forms.

Attach the following items:

- A copy of the complete Travel Pre-Approval Form
- A copy of the conference brochure including conference itinerary.
- A copy of your flight itinerary, if applicable (regardless of requesting reimbursement for flight).
- Original, detailed receipts for meals, lodging reimbursements, and rental car **if pre-approved.**
- Copy of the Purchase Order for the Traveler's reimbursable expenses
- Copies of all travel-related Purchase Orders
- Submit your completed travel packet to Business Services for reimbursement

Mail Stop 1A, Attn: **Accounts Payable**