

North Kansas City Schools Travel Reimbursement Guide

(Rev. 06/22)

This document is an excerpt from the Administrative Procedures for Purchasing (07/2022). The full document can be found at www.nkcschools.org under Departments, Purchasing.

Staff members should be familiar with what expenses are reimbursable before they travel to avoid any unpleasant surprises when they return. If a staff member has a question he/she should contact the Purchasing Department at ext. 5016 or email: stacy.swenson@nkcschools.org

In accordance with Board Policy DLCA Travel Expenses, the District shall attempt to reimburse employees and Board members for travel and related expenses incurred in connection with District business in such a manner that the individual will not suffer, nor gain, financially as a result of such travel or expense.

Plan in advance. Please allow adequate time to register for events and make hotel/airline reservations. If more than one person is going to the same event, please assign one individual to handle all paperwork.

The first task to be completed by an employee is the Travel Outside KC Metro Form. Show on all forms 1) event dates, 2) event name, 3) event location (city/state), and 4) individuals attending.

The employee's supervisor shall approve requests for release time and the cost center manager who is paying for the event shall approve the charges for the event. The Cabinet Member over the Cost Center shall approve and forward the request to the Superintendent for approval.

Please read **every** section carefully for allowable and unallowable expenses.

Reimbursement shall be made after attending the event. The requester shall be responsible for submitting the request for reimbursement within 30 calendar days of the event. All expenses related to the event shall be paid for from the correct fiscal year, which runs July 1 – June 30. Travel beginning in June, but ending in July is claimed based on the June fiscal year.

The electronic "Travel Expense and Reimbursement Form" is posted on the Purchasing page of the District website. Do not download the form to your computer, as it is an ever-changing electronic document.

Please review the following check-off list before the trip. Note the Business Office cut-off date for checks is one week before a check write. Requests for checks must be entered in BPlus in sufficient time so that processing, including cost center manager approval in work flow, can take place prior to the deadline. Employee reimbursements are paid out once a month, on or the last business day before the 14th. Approved expense reports should be entered and uploaded into BPlus prior to the 8th of the month.

Event Registration: Input a purchase requisition in BPlus for an approved Purchase Order prior to registering. If a Purchase Order is not accepted by the event sponsor, complete a purchase requisition Check Request in BPlus and upload the approved for payment registration forms. Please note in the Print After Notes any registration forms that will need to be printed from BPlus and sent with the check.

For events that require online registration, submit a credit card use request with a copy of the registration information.

Hotel Reservations: Most conferences/events have discounted blocks of rooms at designated hotels. The District's preference is to issue a purchase order for direct billing, second choice is writing a District check for a confirmed reservation, third choice is payment by District credit card. See the Administrative Procedures for Purchasing for details. Lodging is paid for days attending the event plus allowable travel time. **Do not leave additional expenses charged to the room, i.e. room service, movies, snacks, spa, Internet fees.** Additional fees shall be the responsibility of the traveler. Upon check out the traveler shall obtain a detailed paid receipt (except direct billing) and send it to the appropriate department upon return.

Air Travel: Seek the lowest fare possible. Submit a District Credit Card use request for the purchase of the ticket. If an employee chooses ground transportation over air transportation but the cost of the airline ticket would have been less, the reimbursement will be based on the cost of the airline ticket.

Meals: Employees are reimbursed based on a daily meal amount (not actual expenses) for official business travel. The employee is paid a predetermined amount for each meal purchased while he/she attends a conference; a travel day preceding and following a conference is allowed if needed, minus any meals in Kansas City. Any extended stay would be at the traveler's expense. Receipts are not required to receive the meal reimbursement for Level 1 expenses. The employee shall provide an agenda for the event indicating meals that were provided. The daily and single meal amounts will be established by the superintendent or designee based on the IRS Meal Per Diem (ie: Current Level 1 Daily amount \$54, meal amounts \$13 breakfast, \$15 lunch, and \$26 dinner). Board members will be reimbursed based on actual meal expense and provide an itemized receipt.

Personal Vehicle: Mileage will be reimbursed at the IRS rate (currently \$0.625 per mile July 1-December 31, 2022). Include any mileage to be reimbursed on the electronic "Travel Expense and Reimbursement Form" posted on the Purchasing page of the District website. Staff members shall use the electronic "Travel Log In-District Mileage" form when submitting travel within the district. It is posted on the Purchasing page of the District website. NOTICE: The IRS mileage rate is subject to change throughout the year and the electronic forms will be updated, as needed.

In cases, where travel may involve going from city to city, mileage is always claimed from your work site (Central Office address) not from home. In some instances, this will be less mileage, and in other cases more mileage, depending on the destination. However, IRS rules and political subdivisions of the State prevent any reimbursement of "from home to work" or visa versa. When traveling by air the District will pay mileage from your work location to the airport. The district will reimburse employees for long term parking up to \$10.00 per day with an original paid receipt. District staff receiving a stipend for local travel shall only be reimbursed for mileage beyond the Kansas City Metro.

Taxi/Shuttle/Ride Service: Taxi, shuttle, and ride service expenses may be reimbursed with an itemized receipt for the travel and up to 20% gratuity. One person may pay for a group/shared ride and be reimbursed for the expense.

Unallowable Expenses: Alcoholic beverages, entertainment, fines, traffic tickets, gifts, phone calls and other items for personal use, and expenses incurred by an accompanying guest/companion. Tips for non-meal services are a personal choice and will not be reimbursed; this includes but is not limited to bell hops, luggage handlers, etc.