

Travel Process Map – Day Travel

1.0	Travel/training need is identified by employee(s).
2.0	<p>Employee(s) discusses travel with supervisor and all the questions below need to be answered:</p> <p>When is the training? What costs are associated with the trip? Who pays for the travel and which employee(s) is/are going on the trip? Where is the training? How will employee(s) travel? Why is the trip necessary? How is it related to the strategic plan, building/department or personal goals? Has the vehicle request been made within 24 hours of the trip? A Form 172 is needed for each requisition request.</p>
3.0	Enter training request in My Learning Plan.
4.0	If approved by supervisor and/or PDC, registration needs to be completed and submitted to building/department secretary. Please use early bird registration discounts.
5.0	Vehicle trip log (Form 163) is completed and submitted to building/department secretary 24 hours before the vehicle is needed. Phone verification is made at this time as to the availability of a school district or rental vehicle beginning with the staff responsible for vehicle checkout at your location. (High School -Athletic Office, Middle School Centers and Administration Center.) Building/Dept. secretary returns to the employee a copy of the vehicle log with verification of the availability of a school district vehicle. The original form 163 will need to be forwarded to the center where the vehicle is requested. Per board policy, mileage will be paid to an employee when there is no school or rental vehicle available as long as the request has been made within the 24 hour timeframe. If no district or rental vehicle is available at this time please include the form 163 or an email documenting this when filing the form 172.
6.0	If PDC funding is requested building/department secretary forwards completed registration form to PDC secretary at the Administration Center.
7.0	PDC Secretary reviews completed registrations, determines appropriate method of registration and enters requisition into Skyward. Form 172 needs to be completed by the individual doing the travel/training and attached to requisition for registration. Complete a form 172 for each requisition.
8.0	Business office registers and sends Payment/P.O.
9.0	Employee attends training/meeting. If employee doesn't attend they must notify accounts payable in the business office and the PDC secretary.
10.0	Please see PDC Flow Chart to complete PDC requirements.
11.0	If Other funding is requested building/department secretary reviews completed registrations, determines appropriate method of registration and enters requisition into Skyward.
12.0	Business office registers and sends Payment/P.O.
13.0	Employee attends training/meeting. If employee doesn't attend they must notify the business office.
14.0	Keep detailed receipts. In order to track daily meal reimbursement requirements (per the board travel policy) itemized receipts showing detail transactions per individual must be submitted.

15.0	A form 172 needs to be completed with the above detailed receipts. You need to show how the expense is directly related to USD 308. This can be the agenda/minutes of your meeting or a copy of the workshop brochure attached to this form. Form 172 needs to be signed by the employee and the supervisor before submitting it for reimbursement.
16.0	One-day workshops/activities where staff is dismissed for lunch or if they stop to eat on the way to or back can be reimbursed under board policy, but will be taxed on the next available payroll to satisfy IRS requirements.
17.0	According to the board travel policy tips will not be reimbursed over 15 percent unless the tip is part of the bill set by the restaurant for large groups.
18.0	All meals paid from a building/athletic activity account will be sent to the board office monthly by the building treasurer. If the above requirements are not met, the reimbursement will be considered a taxable benefit and the appropriate tax deduction will be made on the next payroll.
19.0	All travel expenses need to be submitted within five (5) days upon return of your trip to your building treasurer for reimbursement. Complete a form 172 for each requisition. Building/Department assigns budget codes and proper distribution within the budget lines before sending form 172 to the business office. If you have a purchasing card you will need to follow the purchase card handbook for submitting your statements for payment. Purchasing card receipts will also need to follow the above guidelines.
20.0	Form 172 available at http://www.usd308.com/staff/index.html .
21.0	Contact the business office for assistance at 665-4439 or 665-4442.