

Travel & Reimbursement: A Guide from Purchasing

It's as easy as 1, 2, 3... 4

1. Complete [Travel Approval Form](#) (account needs to be fixed- suggestion use Informed K-12?)
2. Create requisitions
3. Travel!
4. Submit Travel Reimbursement Claim Form

[Travel Approval Form](#)

- Should be submitted in Escape 30 days in advance of travel
 - Fully signed, including BA and Supervisor
- *In an ideal world*, airfare, lodging and registration fees are prepaid by the district
- Currently, we don't have a travel agency (onboarding is happening but slow), so that airfare is done on a reimbursement basis
- This form is to show to the Purchasing Department that you've received approval from your Budget Manager (BA) /Supervisor and the money is in your budget
- Airfare:
 - Lowest possible refundable fare
 - No first class, no priority boarding, no bulkhead seating, no extra footroom, etc

Create Requisitions

- Create travel & conference requisitions for the hotel and conference registration
 - Use the hotel and the conference as vendors
- Attach Travel Approval Form
- Yes, you need TWO requisitions (one for hotel, one for conference)

Travel

- Learn a lot
- Have fun
- Save your receipts!

No additional approval needed for out of state travel

Submit [Travel Reimbursement Claim Form](#)

- Spending limits(can't combine meals, i.e. cannot skip breakfast to spend \$45 on dinner):
 - Breakfast \$15
 - Lunch \$18

- Dinner \$30
- No alcohol
- Parking, tolls, rental car, mileage
 - If you have a rental car, you will not be reimbursed for mileage
- Submit to AP via email or hand deliver (no Escape at this time)
- Maximum Reimbursement \$250 PLUS the cost of airfare
 - If above \$250, submit to Pauline