

Travel Quick Guide

NOTE: This is only an overview of travel requirements. For complete travel procedures, see the [DMPS Business & Finance Procedure Manual](#)

Last Updated: March 2024

Pre-Travel

While Traveling

Post-Travel

Submit Travel Request Web Form

- **Receive BusinessPlus Workflow Approval (via Email)**

Pre-Book Travel Expenses

- **Book Registration, Hotel, Flight**
 - Use p-Card
 - Submit Itemized Receipts to Office Manager / Bookkeeper / Administrative Assistant within 5 days

Travel

- **Hotel Expenses**
 - Use p-Card
- **Meals Expenses**
 - Per Diem Reimbursement
- **Ground Expenses**
 - Reimbursement (itemized receipts, 20% tip)
 - p-Card (itemized receipts, 20% tip)

Complete Expense Report (within 7 days)

- **Update Expense Estimates to Actuals**
- **Submit Approval Email**
 - In PDF
- **Submit Conference Agenda**
 - In PDF
- **Submit Itemized Receipts**
 - Pre-booked expenses
 - p-Card expenses
 - Reimbursement expenses

Pre-Travel: Submit Travel Request

TIP: Employee Online can be accessed while in a district building and using the district network (connected via secure district wifi or ethernet)

TIP: Use the Edge browser

Each employee must submit a completed Travel Authorization Request (Prior Approval) form via webform in Employee Online

Employees will receive approval e-mail notification from BusinessPlus workflow when their travel request has been approved

Save the approval email as a PDF

- Submit to OM/BK when submitting pre-travel expenses
- Attach to the travel expense report post-trip

Pre-Travel: Pre-Book Travel Expenses

After receiving approval,
use a p-Card for
conference registration,
book hotel/flight, etc.

- Travel is only authorized for one day before the conference begins (unless other business purpose noted)
- The district only covers “reasonable and necessary expenses”
- For out of state trips, if driving instead of flying, the district only covers up to average round trip airfare - analysis must be included
- Any additional costs due to personal travel or changes to travel due to personal reasons are the traveler’s responsibility
- Plane tickets should be the lowest cost available, which is generally non-refundable with no insurance (including one bag fee per person – checked or carryon). No other electable add-ons are allowed.
- When securing a hotel, if a conference room block is no longer available, the hotels should be of a similar rate (or less than) the rate negotiated by the conference.

Submit all pre-book
receipts to p-Card
reconciler within 5 days

- Save these receipts and Conference Agenda to attach to the travel expense report post-trip

While Traveling: p-Card Required



Travelers must take a district p-Card

- The pre-book is just a reservation, the hotel will need the physical card to swipe at check-in
- p-Cards can be checked out from Office Manager / Bookkeeper / Administrative Assistant (or can be an individual's card)

While Traveling:

Meals & Incidentals and Ground Transport (train, taxi, rideshare)

Use Personal Funds

Ground Expenses

- Get and submit itemized receipts
 - 20% max tip
- Employee reimbursed after Expense Report is Submitted & Approved

Meal/Incidental Expenses

- No need to keep receipts
- Daily rate starts at \$59
 - Assuming no meals provided; If meals are provided, the per diem is reduced accordingly; rate adjusted for first/last day of travel
- Employee reimbursed after Expense Report is Submitted & Approved

Use District P-Card

Ground Expenses

- Get and submit itemized receipts
 - 20% max tip

Post-Travel: Complete Travel Expense Report

Within 7 business days, Employees must complete the travel expense report web form in Employee Online

Update travel estimates to actual expenses

Submit the following in PDF

- 1) Approval e-mail
- 2) Conference agenda
- 3) Itemized p-card receipts
 - Pre-travel expenses (registrations, bookings, etc.)
 - Expenses incurred during travel (example: ground transportation, parking)
- 4) Itemized personal receipts for reimbursement
 - Expenses incurred during travel (example: ground transportation, parking)

Unallowable Expenses

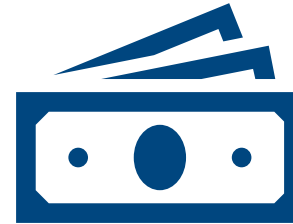
- Unallowable purchases / overages must be paid by the employee to the district.
 - Option 1: pay in person (Office Manager / Bookkeeper) or make payment online + Attach the repayment receipt in the Expense Report
 - Option 2: reduce reimbursement owed

Post-Travel: Review by Business Office



AP will review all p-Card expenditures

Employee must repay any unallowable purchase / overage +
Include documentation of reimbursement as an attachment in
the Expense Report OR elect to reduce reimbursement



AP will review M&I and out-of-pocket expenses for reimbursement to Employee

Reimbursement will be processed and remitted via direct
deposit