

Instructions for Completing the Professional Development/Travel Authorization Form

Revised 08-23-13

Employee Name: Write the name of the employee making the request. If the request is for a group of 5 or more employees, write "See Attached" and attach a list of the employees. Each employee will need a copy of the approved form to attach to their request for reimbursement after the Professional Development (PD) or travel is completed.

Dept/School: The school name, or the department name, if it is for administrative personnel

Date: The date the employee prepares the form

Purpose/Description: The purpose of the requested activity and/or a description of the activity

Destination: The location, city and state, where the professional development or training will occur, or the travel destination. County is the destination county.
(This is used to determine lodging and per diem rates)

Travel Dates: The Departure Date and Departure Time; The planned Return Date and Return Time.

Funding Sources: The funding source(s) for the activity.

-If funding is from a single source, check the appropriate funding category (General Purpose, Federal, Other, such as Grant) and then write 100% on that line and write the account code.

-If funded by more than one source, check the appropriate funding categories and then indicate either the percentage of the total expenses to be paid by each category (such as 50% from Title I and 50% from General Purpose), OR state a fixed amount to be paid from a funding source or sources, with at least one account to be used for the balance of the cost. For example, IDEA may fund \$500 of the cost, with the balance being paid from General Purpose. At least one funding source, in this scenario, has to be the account for the balance of costs to be paid from – they all can't be a fixed amount. This is because the PD/TA is only an estimate of costs, and actual expenses will be charged. Specify that amount

Justification: The justification for the professional development and/or travel. **Explain why it is necessary and/or relevant for the district.** The justification is not what a third party gives us, although that information can be relevant and helpful. Attach the brochure, agenda, course outline, and/or other relevant information for each professional development request.

If the PD/TA is to be funded with Title II-A federal funds, the justification must state what Goal the PD supports.

Estimated Expenses

The cost for the PD/travel is to be estimated, in accordance with the travel regulations and board policy. Reimbursement after the PD/travel is completed cannot exceed the amount approved on the form, so the employee should estimate sufficiently all expected costs.

This total estimated cost is one of the key factors used by district management in determining if the request will be approved, including availability of sufficient funding.

Lodging: The travel regulations specify the maximum daily rate that can be reimbursed for lodging, based on the county and state. All taxes charged in addition to the daily rate are listed separately and can be reimbursed. A receipt is required for reimbursement.

Days: Indicate the number of days/nights of lodging.

Amount per Day: Enter the daily rate for the hotel/facility. This amount cannot exceed the travel regulations maximum rate for that county/state.

Local taxes and fees: Enter the amount of local taxes and fees. These are assessed in addition to the daily rate. DO NOT INCLUDE parking or incidental charges of the facility.

Meals: The Per Diem amount is based on the county and state where the employee will be. The daily rate is based on the federal GSA Conus rates. That information is available on their website: <http://www.gsa.gov/portal/category/21287>

The per diem reimbursement is only 75% of the daily rate for the first and last day of travel. So the first line for Meals would always be 2" Days for travel lasting 2 days or more. The per diem rate is 75% of the daily rate. Multiply these factors to get the total extended per diem cost.

The next line for Meals is the number of days beyond the first and last day, and the daily rate is entered. Multiply these to get the extended per diem on these days.

No receipts are needed for per diem reimbursement.

Transportation: Indicate by checking the appropriate box what mode of transportation will be used for the travel.

Private vehicle – if an employee is driving their personal vehicle. If so, complete the number of miles and multiply times the current mileage rate to get the total mileage reimbursement amount. Attach documentation showing the mileage, such as point-to-point from Mapquest.

Mileage is based on starting location (which may be employee's home or the office) and ending location. If employee is traveling on a standard work day, from their home to a location other than the place they report to work, deduct their commuting miles when determining the miles to be reimbursed.

If a private vehicle is being driven for official school travel the employee can be reimbursed at the standard mileage rate, in effect as of the date the travel took place. Round the number of miles; do not use fractions.

School vehicle – if a school/county vehicle will be driven

Airfare – if traveling by air, state the cost of the airfare

Car Rental – indicate the costs for a rental car. The school district has insurance, so purchasing insurance from the rental company is not needed. Include the cost of gas if it will be purchasing from the rental car company. If it will be purchased separately, include the gas costs in OTHER (below)

Shuttle/Taxi – if a shuttle or taxi will be used, indicate the costs.

Registration/Conference Fee: Indicate any registration fee or conference fee. A registration form should be attached, filled out for the employee. However, registration should not be done until AFTER the request is approved.

Check one of the boxes: Request the Finance Office to pay the registration/conference fee. To do so, the completed registration form must be attached so the Finance Office can send it with the payment. And the contact information where to send it must be included.

Employee to Pay and Be Reimbursed. The employee can elect to pay the fee and include it on their expense reimbursement form after the training/travel is completed. A copy of the registration form that will be submitted still needs to be attached to the request.

Substitute Teacher: Indicate the Number of substitute teachers needed; state the # of days, using half day (.50) and whole day (1.0) increments ONLY. Multiply this times the maximum cost for a certified teacher. Actual costs will be billed based on actual costs of the substitute teacher(s) used.

Other: List each additional expense, stating what it is and the estimate. Include parking, whether for hotel or for personal vehicle at the airport or rental car company. Include gas if purchasing it for a rental car.

Total Estimated Cost: Add all the cost items above for the total estimated cost for the request. If the request is approved, the reimbursement WILL NOT EXCEED this amount, and cannot exceed the specified travel regulation rates for lodging, per diem, mileage, etc.

Approval Signatures:

The required approvals are to be obtained in the sequence of the signatures as listed on the form.

--**Employee** must sign, making the request. If a group is making the request, a list can be attached and write "SEE ATTACHED" but then a supervisor or department head must sign on behalf of the employees.

--**Supervisor/Principal** must approve the request of their employee.

--**Budget Manager**, if applicable, must sign. This is applicable when a funding source is being used that is not under the direct responsibility of the Supervisor/Department Head. For example, a teacher is requesting training, using Title IIA Funding. The Principal signs as the Supervisor/Dept Head and the District Supervisor responsible for the Title IIA program would also have to approve the request as the Budget Manager.

--**Finance Office** approval is needed to verify sufficient funding is in the funding sources identified, and the estimated amounts follow the Travel Regulation limits.

Director of Schools: This is the final approval.

Once all the approval signatures are obtained, the authority/approval is effective. The date of the final signature is the authorization date. At that point, reservations can be made and costs incurred.

Travel reservations, payment of registration fees, and other costs that are incurred PRIOR to the effective date of the authority/approval being completed are the sole responsibility of the employee and the school district is not required to reimburse the costs.

Changes and Amendments

If the employee learns that the estimate is incorrect or does not include all the estimated costs, either a new PD/TA should be done to replace the original one (and the original one should be attached and marked as RETRACTED), or an amended form should be completed and routed for all the approvals. The amended form can be the original, with changes indicated in a different color ink, or a second form completed and attached to the original approved form.

*****If this amendment is done AFTER the beginning date of the PD/Travel (Departure Date above), a memo must be written to the Director of Schools explaining why the amendment is needed and the full costs were not included on the original approval. If the amendment is not approved, the employee is personally responsible for the payment of these costs.**