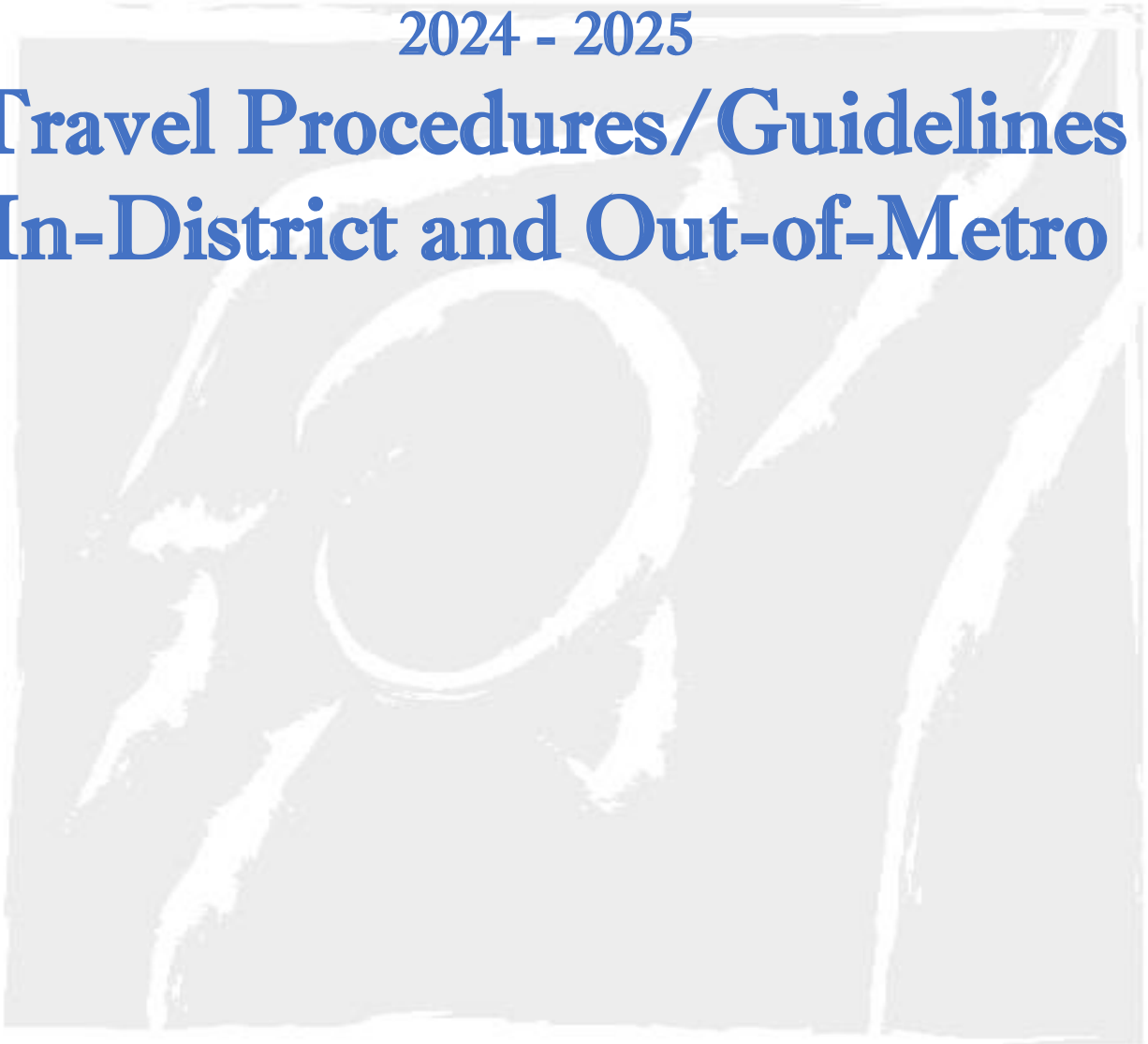

Lee's Summit R-7 School District
2024 - 2025

Travel Procedures/Guidelines In-District and Out-of-Metro



LEE'S SUMMIT
R-7 SCHOOLS

Learning for Life

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The District will be implementing an online travel request system, ETRAVEL, during the 2024-25 school year.

TRIP APPROVAL PROCESS-TRAVEL REQUEST

A **Travel Request** must be submitted by the employee for approval to attend a conference or workshop. A **Travel Request** is required for every conference, meeting, and professional in service/training requiring travel arrangements (i.e. hotel, airfare, rental car, meal money).

A **Travel Request** is required for student athletic/activity travel requiring accommodations (i.e. hotel, airfare, or rental car). **Student travel requiring airfare with more than 20 people (including staff and chaperones), must be approved through a Travel Request but accommodations will be booked by a District approved travel agency.**

After the form has been approved and coded by the Budget Manager and Supervisor, it should be submitted to the SLT Supervisor for Approval. The SLT Supervisor will then submit to the Business Services Office. If multiple account codes will be used to fund the travel, then all appropriate account codes must be referenced on the form.

Travel arrangements will not be made until all approved documents are received by the Business Office. The Business Office is not responsible for completing conference/workshop registration. The Business Office is not responsible for travel arrangements outside conference/meeting window. Please ensure appropriate time for building/department approval and SLT Supervisor Approval.

- Staff members who personally pay their own way may be allowed to attend conferences. Professional leave may be used contingent on approval from their supervisor and availability of funding for substitutes.
- Travel arrangements should be scheduled in a fiscally responsible manner:
 - Carpool to and from the airport/meeting when practical
 - Minimize the number of nights and rooms required for overnight stay
 - Compare hotel prices prior to making reservations
 - Compare the total cost of the trip
 - Send minimum number of staff necessary to meet program essential needs
- Staff travel will be restricted to the contiguous 48 states. Any travel outside of the country must be approved by the Superintendent of Schools. Valid passports, passport number and expiration date will be needed to book the flight. If you have a district cell phone, you may need to contact the Technology Department to change your phone plan to minimize cost while you are traveling. Learn what medical services your health insurance provider covers. Blue Cross/Blue Shield does cover international travel. Credit card/bank should be notified prior to leaving making them aware of the

international travel. Check and understand exchange rates. Be aware of the entrance/exit requirements to where you are traveling.

- Staff will be expected to share the information/knowledge gained through professional development/training with other staff members, where appropriate.
- Approved **Travel Requests** should be submitted to Business Services as soon as possible in an effort to minimize trip expenses.
- It is important that all anticipated expenses be estimated as accurately as possible on the Travel Request form. Budget Managers will determine whether a particular trip will be fully or partially funded/reimbursed.
- **REGISTRATION** - Registration forms showing payment must be attached to the Travel Request. Conference/Workshop Agenda **MUST** be attached to the Travel Request.

AIR TRAVEL

The Business Services Department is responsible for making all airline reservations. Contact Business Services as soon as possible prior to traveling to obtain the lowest possible air fares. Reservations should be confirmed at least 6 weeks prior to the trip in order to take advantage of the most economical fares. The Business Office will only book reservations through the larger airline carriers.

Air travel should not be purchased by individuals using a District purchasing card. Air travel reservations WILL NOT be secured without an approved Travel Request.

Student travel requiring airfare with more than 20 people (including staff and chaperones), must be approved through a **Travel Request** but accommodations will be booked by a District approved travel agency.

LODGING

Lodging preferences should be listed on the Travel Request. Then Business Office will try to honor requests if fiscally responsible. All hotel accommodations should be booked and paid by the Business Services Travel Specialist. When rooms at the hotel hosting the conference are unavailable or are cost prohibitive, other nearby lodgings will be utilized.

In the event a hotel room is shared with someone other than a District employee, only the single room occupancy rate will be paid/reimbursed. If the hotel rate is the same for single and double rooms, attach a copy of the conference registration materials stating room charges. Based on budgetary considerations and room availability, the Budget Manager or Supervisor may restrict hotel room occupancy to employees only.

MEALS

Advance meal allowance per diem will be given to the traveler via EFT approximately one week prior to traveling. The district will advance funds for meals in accordance to travel times and what is not covered by the conference or hotel. This amount should be documented on the Travel Request. The standard rate which is governed by the IRS will be used to calculate the allowance and is listed below. Business-related banquets or meals that are considered part of the conference may be paid with registration fees but will be deducted from the per diem. Per diem calculation as follows:

Breakfast \$15.00	Lunch \$17.00	Dinner \$27.00	Total \$59.00
Meal Breakdown by Travel Times			
Day of Departure		Day of Return	
Breakfast	\$ 0.00	Arrive after 8 AM Breakfast	\$15.00
Depart After 6 AM Lunch	\$17.00	Arrive After 12 Noon Lunch	\$17.00
Depart After 12 Noon Dinner	\$27.00	Arrive After 6 PM Dinner	\$27.00

MEALS WILL NOT BE PAID WITH DISTRICT FUNDS OR REIMBURSED UNLESS AN OVERNIGHT STAY IS REQUIRED IN ACCORDANCE WITH IRS FRINGE BENEFIT GUIDE. OTHERWISE REIMBURSEMENT WILL BE TAXABLE.

CAR RENTAL

If approval has been granted for a vehicle, reservations will be secured by the Business Services Travel Specialist. All cars will be rented through Enterprise as the District has a corporate agreement.

Gasoline purchased for use of a rental vehicle may be charged on a district purchasing card or reimbursed if paid personally. The vendor’s policies regarding return of the vehicle with a full tank of gas should be followed. Obtain receipts for all gas purchases. Failure to follow these guidelines may result in reimbursement to the district from personal funds.

A “Commercial Bus Chartering & Rental Request” must be completed 10 days in advance of the date of trip if renting a vehicle and transporting students.

DRIVING PERSONAL VEHICLE

In the event you opt to drive your personal vehicle to an out-of-metro-area conference, when air travel would be the most economical, you will be reimbursed the lesser of the actual mileage or the cost of airfare. If you plan to drive rather than fly, you must note that on the meeting request form. To obtain airfare costs contact Business Services. Gas for personal vehicles is NOT an allowable expense and will be reimbursed to the District from personal funds.

TRIP CHANGES OR CANCELLATION

If an employee changes or cancels an approved trip for any personal reason, notify the Travel Specialist, Budget Manager and Supervisor immediately. Most airline tickets are non-refundable and non-transferable. If an employee changes or cancels a trip after the tickets have been purchased, he or she may be held personally responsible for reimbursing the District for the full cost of the tickets. The employee may also be held accountable for other pre-paid fees (conference fees, hotels, etc.).

AUTHORIZED EXPENSES AND REIMBURSEMENT

Itemized receipts for all expenses must be submitted to Business Services. Receipts for reimbursable expenses should be stapled to the "Out-of-Metro Travel Expense Report". Expenses charged on a District purchasing card should be allocated in the credit card system with detailed itemized receipts. **Reported expenses without itemized receipts/or that do not comply with District policy will not be reimbursed. Unauthorized purchases on a district credit card will result in reimbursement from personal funds. All expenses should be reported within thirty days of the trip.**

BAGGAGE FEES-The District will reimburse or pay for one piece of luggage to and from the destination, excluding additional charges for over-sized or over-weight luggage.

AIRLINE UPGRADES-any additional upgrades for priority boarding or seat upgrades will not be paid with District funds.

PARKING- "Garage" and "Valet" parking at KCI is not authorized. Only fees for "Economy" or "Surface Lot" parking at KCI will be reimbursed or may be charged on a District Purchasing Card. Other parking vendors with comparable rates may also be used. Any upgrade to parking is NOT an allowable expense and will be reimbursed from personal funds. Max parking reimbursement is \$18.00 per day.

GROUND TRANSPORTATION - Parking, taxis, buses, shuttles, ubers and tolls – receipts are required.

REIMBURSEMENTS - Reimbursement of mileage and/or travel expenses will be processed and deposited into the same bank account used for payroll. Email notification for pending deposits will be sent when processed.

UBER – Please remember that UBER/LYFT should only be used for the business of the Conference, not personal travel for sightseeing. If multiple UBER rides will be needed a car rental should be considered as a possible option. Please do not hesitate to contact Kelly Davis at ext. 61081 if you have questions or would like to discuss options related to Ground Transportation.

TRAVEL WITH STUDENTS

Athletic/ Activity Travel with Students requiring overnight travel will be allowed a maximum of \$40 per day for meals. A district purchasing card should be used when traveling with students. No advance per diem will be given.

This per diem also applies to In-District activities requiring meals for students.

Extenuating circumstances may apply to curricular-sponsored travel with students and permission should be requested from the SLC Department/Building supervisor for consideration.

SUMMARY OF UNAUTHORIZED EXPENSES

1. Alcoholic beverages.
2. Movie tickets, theater tickets, in-room movies, tours and other entertainment.
3. Expenses for spouse, children or other traveling companions.
4. Gifts
5. Personal items including candy, snacks, tobacco and toiletries.
6. Unauthorized car rentals.
7. Commuting mileage from home to workplace.
8. Gasoline for personal vehicle.
9. Expenses submitted without itemized receipts.
10. Tips exceeding the limits stated within these guidelines.
11. Kansas and Missouri sales tax.
12. Personal expenses such as tipping for luggage and maid service.

IN-TOWN MILEAGE REPORTING

PERSONAL VEHICLE USAGE – reimbursed at the District's normal per mile rate. The current rate is \$.67/mile, which was effective 1/1/2024 (this may update on 1/1/25 based on IRS regulations). Mileage is calculated via the In-Town Mileage System/ETravel.

The following criteria should be followed when calculating in-town mileage:

- Employees beginning their work day at a location other than their primary work location may be reimbursed based on mileage calculated from the work or home location to the location where the work day begins, whichever is the **lesser** mileage.

- Employees ending their work day at a location other than their primary work location, may be reimbursed based on mileage calculated from the location where the work day ends to the home or work location, whichever is the **lesser** mileage.
- In-Town mileage is to be submitted electronically on a monthly basis. Mileage reimbursement must be expensed in the fiscal year the mileage occurs. Mileage that has occurred for the month of June will carry over into the next fiscal year. All mileage must be submitted and approved by the budget manager prior to June 15th of the current year. Failure to submit may cause forfeiture of mileage reimbursement. The link can be found: Staff>Pages>Employee>APPS>Mileage.

INSTRUCTIONS FOR COMPLETING THE OUT-OF-METRO-AREA TRAVEL EXPENSE REPORT

- Reimbursement for expenses paid out of pocket can be requested by submitting an Out of Metro Expense Report to your supervisor for approval and then to Business Services. **ONLY** expenses paid by the employee should be reported on the Out of Metro Expense Report. Expenses charged on a District purchasing card should not be entered on an Out of Metro Expense Report.
- Enter name, building, dates of travel and account code to be charged. Traveler's employee identification number should be completed on the form before submitting.
- List all expenses by day in the appropriate columns. Only enter expenses to be reimbursed. If meals are for more than the traveler, include the name(s) of the additional travelers.
- Total all columns and rows (horizontally and vertically). Attach all itemized receipts. Reimbursement will not be made if the receipt is not itemized.
- Calculate round trip mileage from your home or your work location, whichever is closest to your destination. Multiply the mileage total by the current reimbursement rate and add to other expenses. Any business use of a personal vehicle after arrival at the destination is also reimbursable and should be added to mileage shown above.
- Sign and date the form and forward to the appropriate Budget Manager/Supervisor for approval.
- Reimbursements are paid weekly. Notification via email will be sent after reimbursement has been processed with payment details.

Appendix A

State of Missouri

**LIMITED EXEMPTION
FROM MISSOURI SALES AND USE TAX ON PURCHASES AND SALES
(Public School)**

Issued to:

Missouri Tax I.D. 12585521

REORGANIZED SCHOOL DISTRICT NO 7 OF JACKSON CTY
301 NE TUDOR ROAD
LEE'S SUMMIT MO 64063

Effective Date: 07/11/2002

Your application for sales/use tax exempt status has been approved pursuant to Section 144.030.2(19), RSMo. This letter is issued as documentation of the exempt status of your organization. The organization above must adhere to the requirements of this exempt status.

This is a continuing exemption subject to legislative changes and review by the Director of Revenue. Outlined below are specific requirements regarding this exemption. This summary is not intended as a complete restatement of the law. You should review the law to ensure your understanding and compliance.

- This exemption is not assignable or transferable. It is an exemption from sales and use taxes only and is not an exemption from real or personal property tax.
- Purchases by your organization are not subject to sales or use tax if conducted within your organization's exempt functions and activities. When purchasing with this exemption, furnish all sellers or vendors a copy of this letter.
- Individuals making personal purchases may not use this exemption.
- A contractor may purchase and pay for construction materials exempt from sales tax when fulfilling a contract with your organization only if your organization issues a project exemption certificate and the contractor makes purchases in compliance with the provisions of Section 144.062 RSMo.
- Sales by your organization are not subject to sales or use tax if conducted within your organization's exempt charitable and educational functions and activities.
- Any alteration to this exemption letter renders it invalid.

If you have any questions regarding the use of this letter, please contact the Taxation Bureau, P.O. Box 358, Jefferson City, Missouri 65105-0358, Email salesuse@dor.mo.gov, or call 573-751-2836.

03/26/13

Appendix B

Kansas Department of Revenue Sales and Use Tax Entity Exemption Certificate

The Kansas Department of Revenue certifies this entity is exempt from paying Kansas sales and/or compensating use tax as stated below.

Kansas Exemption Number: KSMMS4EKDC

Expiration Date: 10/01/2024

The tax-exempt entity understands and agrees that if the tangible personal property and/or service are used other than as stated, or for any purpose that is not exempt from the tax, the tax exempt entity is liable for the state and local sales or use tax. The unlawful or unauthorized use of this certificate is expressly prohibited, punishable by fine and/or imprisonment. The certificate is issued for the sole use of the exempt entity as named.

Reorganized School District No 7
301 NE Tudor Road

Lees Summit, MO 64086



EXEMPT ENTITY INFORMATION:

Authorization and scope:

- K.S.A 79-3606(c) & (d) - Public or Private Elementary or Secondary Schools or Nonprofit Educational Institutions.
- Exemption applies to all direct purchase, rental or lease of tangible personal property and services, except purchases of goods for human habitation and indirect purchases by a contractor for a real property project with a PEC.

Limitations:

- Only direct purchases are exempt through the use of this certificate.
- This entity qualifies for exemption on indirect purchases by a contractor through the issuance of a Project Exemption Certificate (PEC). PECs should be obtained from the department prior to the start of the project. Apply on-line at KDOR's web site: www.ksrevenue.org
- This exemption does not apply to the purchase of any construction machinery, equipment or tools by a contractor used in the constructing, maintaining, repairing, enlarging, furnishing or remodeling facilities for the exempt entity.
- Subject to sales tax are purchases of capital goods used for human habitation (i.e. residential housing and dormitories) to include materials for construction, remodeling or repair and furnishings such as beds, curtains, desks and furniture. Labor services on dormitories are exempt as residential construction.



Exempt Entity Authorized Signature (Officer, Office Manager or Administrator)
 Steve Williams

Printed Name

44-6004933

Federal ID Number
 08/12/2020

Date

RETAILER INFORMATION:

- To qualify for exemption, the certificate must have an expiration date in the future and be signed by an authorized individual.
- Payment must be made by the entity on their checking account or on a credit/debit card issued to the entity. Acceptance of cash, personal checks, or personal credit/debit cards is not allowed for a tax exempt purchase.
- The entity must have a Kansas exemption certificate. Exemption certificates issued by other states are not valid in Kansas.
- Retailers are required to maintain a copy of the purchaser's certificate in their records for at least 3 years from the date of purchase. Retailers must maintain a current certificate on file.
- Selling tax exempt goods or services that are not exempt by statute may result in the assessment of tax.
- A completed certificate may be used as a blanket exemption for future purchases when of the same type and for the same exempt purpose.

Seller's name and address

Description of goods and/or services purchased

For additional information on Kansas sales and use taxes see Publication KS-1510, *Kansas Sales Tax and Compensating Use Tax* and Publication KS-1520, *Kansas Exemption Certificates*, located at: www.ksrevenue.org Questions would be directed to Taxpayer Assistance at 785-368-8222.

PR-78ED
(08/15)