**Staff Travel Checklist**

**TRAVEL CONTACT: TONI CHADWICK EXT: 90691**

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**Before the trip**

- **Traveler** contacts the hotel directly to make reservations – **NO third-party vendors allowed** (Hotels.com, Expedia, Travelocity, NO PREPAID RATES etc.).

  Out of state travel must be approved by supervising Executive Council member via email and included with the requisition request.


  Traveling staff from MISD can share rooms to meet this requirement as each individual traveler is allotted the GSA rate.

- **If hotel rates exceed the allotted amount from the budget code owner who is funding travel, or traveler is sharing a room with staff from another District, traveler must use personal form of payment during travel and submit allowable expenses for reimbursement AFTER travel has concluded – NO EXCEPTIONS**

  Traveler will use personal credit card to hold the room reservation if no deposit is required. If a deposit is required, call the Travel Contact listed above.

  Does the hotel charge for parking? If yes, daily rate ____________ **No valet parking unless there is no other option**

  Does hotel require a credit card authorization form when using a District travel card? _____ Y _____ N

  *DO NOT CONTACT THE HOTEL TO ASK FOR CREDIT CARD AUTHORIZATION.*

- **Rental car required** _____ Y _____ N

  If required, see Travel section of Purchasing SharePoint for instructions

- **Airfare required** _____ Y _____ N

  If required, see Travel section of Purchasing SharePoint for instructions

  Name of Traveler: ________________________________________________________________

  Reason for Travel: _______________________________________________________________

  Dates of Travel: __________________________________________________________________

  Budget Code for Travel: ___________________________________________________________

  WHEN COMPLETE, SUBMIT 1) TRAVEL CHECKLIST, 2) HOTEL/RENTAL CAR/AIRFARE CONFIRMATION(S), 3) COPY OF GSA RATE FOR HOTEL LOCATION, 4) CREDIT CARD AUTHORIZATION FORM IF REQUIRED BY THE HOTEL, AND 5) ANY REQUIRED APPROVAL EMAILS TO YOUR SECRETARY/BOOKKEEPER AND REQUEST PURCHASE ORDER(S) AT LEAST 15 DAYS PRIOR TO TRAVEL.

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**Reserve Travel Card**

- Once PO has been approved you will Log into Classlink and set up a ticket with Technology Helpdesk - IncidentIQ to reserve your travel card. Once the card has reserved you will receive an email from IncidentIQ telling you that your card is ready for pick up.

  [https://misd.incidentiq.com/agent/tickets/new#top](https://misd.incidentiq.com/agent/tickets/new#top)

  *Select* 1) Other Requests 2) Business Services 3) Travel Card Checkout - Then complete the ticket with the information from your approved PO. Once the card is reserved and ready for pick up you will receive an email from IncidentIQ informing you that you can then pick up your travel card.

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**During the trip**

- Travelers are responsible for checking in at the front desk and presenting the Hotel Occupancy Tax Exemption form if in Texas. Out of state trips are not tax exempt and the District pays all hotel taxes/fees.

- Travelers are responsible for checking out at the front desk to ensure the bill is correct (i.e. no state taxes within Texas, no personal charges, etc.). **No under the door receipts will be accepted.** Final bill must show payment with the district travel card and a zero balance.

- Travelers are responsible for following **ALL** travel guidelines included in the district travel card packet issued at checkout. Travelers not following this guidance will be financially liable for any non-approved purchases with the card.

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**After the trip**

- The travel card packet and hotel receipt MUST be returned to Purchasing within 3 business days after travel has concluded. *Keep copies of all items/receipts to turn in.*

- If hotel charges do not match the PO or if there are unapproved charges on the bill, the receipt will not be accepted by Purchasing. Traveler must contact the hotel directly to correct the charges and/or have the unapproved charges removed. Billing errors and unapproved charges not removed from the hotel bill are the financial responsibility of the traveler and the district must be reimbursed.

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07/17/2023