Register Now for: Love Your Co Workers
Conference Dates June 1-5\textsuperscript{th}, 2016

Training to be held at Sea World in San Antonio

Hosting hotel is: the Hyatt Regency Hill Country Resort & Spa
Waco Independent School District
Out-of-District Travel Request and Reconciliation Form
(You must attach registration or conference info to this form)

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Pre-Trip Estimated Amount</th>
<th>Post Trip Actual Amount</th>
<th>Due Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roundtrip Mileage (per district chart)</td>
<td>miles</td>
<td>0.575 current rate</td>
<td></td>
</tr>
<tr>
<td>Airfare</td>
<td>PO#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car Rental</td>
<td>PO#</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lodging - List Hotel name:</td>
<td>calculate amount using table below</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration Fees</td>
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<td>Public Transportation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other/Misc - Describe:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total**

1) Determine the meal allowance on the day of departure and return (see narrative below)
2) If all days will be full meals, enter $46 per day on the table below
3) For event-provided or hotel provided meals edit daily rate accordingly below
4) Enter the adjusted meal per diem from the table below in the meals section above.
5) For more than 6 days, attach an additional sheet

**Day of Departure:**
- If you leave before 7 a.m., $46, full day
- If you leave before 12 p.m., $38 (for lunch and dinner)
- If you leave before 6 p.m., $26 (for dinner)
- If you leave after 6 p.m., -0-

**Day of Return:**
- If you return after 6 p.m., $46, full day
- If you return between 12 p.m. & 6 p.m., $20 (for breakfast & lunch)
- If you return between 7 a.m. & 12 p.m., $8 (for breakfast)
- If you return before 7 a.m., -0-

All itemized receipts must be returned to the Business Services Department with this completed form within 10 work days after return from the trip or you forfeit your right for reimbursement.
Waco Independent School District  
Out-of-District Travel Request and Reconciliation Form  
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<table>
<thead>
<tr>
<th>Employee Name:</th>
<th>Trendy Traveler</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Campus/Department:</td>
<td>Sul Ross Elementary</td>
</tr>
<tr>
<td>Name of Event:</td>
<td>Love your CoWorkers</td>
</tr>
<tr>
<td>Place of Event:</td>
<td>Sea World, 10500 SeaWorld Drive, San Antonio TX 78251</td>
</tr>
<tr>
<td>Departure Date and Time:</td>
<td>June 1, 2016, 2 pm</td>
</tr>
<tr>
<td>Return Date and Time:</td>
<td>June 5, 2016, conference closes at noon</td>
</tr>
<tr>
<td>Budget Code to be charged:</td>
<td>199-13-6412-00-125-99</td>
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<td>List Name/Campus of Roommate if applicable:</td>
<td>Suzi Slowdown</td>
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**Total**: 2392.69

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<table>
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<tr>
<th>Breakfast $8</th>
<th>Lunch $12</th>
<th>Dinner $26</th>
<th>Full Day Allotment $46</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>26.00</td>
<td>46.00</td>
<td>46.00</td>
</tr>
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<td></td>
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Employee Signature: 
Immediate Supervisor's Signature: 
Federal Fund and/or Grant Signature: 
Cabinet Signature (for administrators travel only): 
Superintendent's Signature (for out of state travel only):

All itemized receipts must be returned to the Business Services Department with this completed form within 10 work days after return from the trip or you forfeit your right for reimbursement.
When requesting a room the following is the information I request in the email.

1. Name of Conference /Training (spell it out please) & web site
2. Number of rooms & people per room:
3. Name of each person in room sharing (staff must share rooms)
   # of girls & boys
4. Check in Date and Check out Date.
5. Copy of approved TR-1 for out of state travel and when using any fund other than local (Grants, title, ect)--- In state need the budget code that is paying for room.
6. If they have a preference hotel ---I will try -but if the request exceeds the districts limit or if the hotel isn’t available then I will book them another location as near the conference as I can.

Once I book the room I will send you the information to do a purchase requisition for the hotel room.

Mary Kay Hopper-Miller, CTSBO
Purchasing Specialist
Waco Independent School District Admin. Building
marykay.hopper_mille@wacoisd.org
ph (254) 755-9451
Guest please take the attached forms with you to the hotel & check. If you are not going to attend please notify your supervisor and Mary Kay Hopper (room requestor). Deduct Breakfast meal money included with the conference also deduct Lunch on June 3rd & 4th included with conference. (Just a reminder meal receipts for reimbursement must be itemized with what you purchased, amount, restaurant name, & date) Guest must pay for parking (self park is $20.00 per night) & get receipt before leaving.

Please double check to make sure all dates & locations are correct. **************************** PLEASE check receipt before leaving the hotel --- no charges are to be left on the district p-card ending 9597 which is used to hold the reservation ****************************

Guest is to pay for own parking & meals and be reimbursed as per policy.

Below I always tell you how the payment is being handled. In this example you hand carry the check to the hotel, another way is to mail the check 3 weeks before the stay, and last is a PO to Chase for payment with the district credit card************

NOTE in blue> Room requestor/Campus/Department, Please do a "Create Check Request" for reservations listed. Reservation will need it's own payment. Remember to check the box by the question "Need Separate Check?  Confirmation #543406 Trendy Traveler sharing with Suzi Slowdown

Request will need all Approvals completed by noon May 16, 2016 in order to have a check on time.

Reservations are at the :Hyatt Regency Hill Country Resort and Spa, 980 Hyatt Resort Drive, San Antonio, TX 78251, (210) 647-1231
Please check that the hotel name is correct when entering on-line check request. Room rate is $239.00 per night per room + resort fee $30.00 + tax per night per room is 10.75% ($28.92)= $297.92 x 4 nights = $1191.68 Total cost room (2 adult person/people per room & 0 children) ********

check in June 1, 2016   check out June 5, 2016

Travel form must have all approval levels before leaving. Review Hotel receipt at check out & turn in copy when you return.

Will need to take a Hotel Tax Exempt form, Employee Id, State Travel Eligible sheet with you (attached hotel & state travel sheets). Will need to pay parking & any other charges and will be reimbursed on your TR-1 (travel form) for allowable expenses according to policy. You are not to leave any unpaid charges on the district's credit card. If you should need to cancel the reservation it must be done 96 hours in advance of check in date, this is the campus & individuals responsibilities - write down cancellation # & name of person you speak with

Mary Kay Hopper-Miller, CTSBO
Purchasing Specialist
Waco Independent School District Admin. Building
marykay.miller@wacoisd.org ***New email***
ph (254) 755-9451
Texas Hotel Occupancy Tax Exemption Certificate

Provide completed certificate to hotel to claim exemption from hotel tax. Hotel operators should request a photo ID, business card or other document to verify a guest's affiliation with the exempt entity. Employees of exempt entities traveling on official business can pay in any manner. For non-employees to be exempt, the exempt entity must provide a completed certificate and pay the hotel with its funds (e.g., exempt entity check, credit card or direct billing). This certificate does not need a number to be valid.

Name of exempt entity
Waco Independent School District

Exempt entity status (Religious, charitable, educational, governmental)
Educational

Address of exempt organization (Street and number)
501 Franklin Avenue (mail address is: PO Box 27, Waco TX, 76703)

City, State, ZIP code
Waco, Texas, 76701

Guest certification: I declare that I am an occupant of this hotel on official business sanctioned by the exempt organization named above and that all information shown on this document is true and correct. I further understand that it is a criminal offense to issue an exemption certificate to a hotel that I know will be used in a manner that does not qualify for the exemptions found in the hotel occupancy tax and other laws. The offense may range from a Class C misdemeanor to a felony of the second degree.

Guest name (Type or print)

Date

Exemption claimed
Check the box for the exemption claimed. See Rule 3.161: Definitions, Exemptions, and Exemption Certificate.

☐ United States Federal Agencies or Foreign Diplomats. Details of this exemption category are on back of form. This category is exempt from state and local hotel tax.

☐ Texas State Government Officials and Employees. (An individual must present a Hotel Tax Exemption Photo ID Card). Details of this exemption category are on back of form. This limited category is exempt from state and local hotel tax. Note: State agencies and city, county or other local government entities and officials or employees are not exempt from state or local hotel tax, even when traveling on official business.

☐ Charitable Entities. (Comptroller-issued letter of exemption required.) Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.

☒ Educational Entities. Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.

☐ Religious Entities. (Comptroller-issued letter of exemption required.) Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.

☐ Exempt by Other Federal or State Law. Details of this exemption category are on back of form. This category is exempt from state hotel tax, but not local hotel tax.

Permanent Resident Exemption (30 consecutive days): An exemption certificate is not required for the permanent resident exemption. A permanent resident is exempt the day the guest has given written notice or reserves a room for at least 30 consecutive days and the guest stays for 30 consecutive days, beginning on the reservation date. Otherwise, a permanent resident is exempt on the 31st consecutive day of the stay and is not entitled to a tax refund on the first 30 days. Any interruption in the resident's right to occupy a room voids the exemption. A permanent resident is exempt from state and local hotel tax.

Hotels should keep all records, including completed exemption certificates, for four years.

Do NOT send this form to the Comptroller of Public Accounts.
CO-OP Members List (http://comptroller.texas.gov/procurement/prog/coop/coopmemb/)

State of Texas CO-OP Listing for

Search CO-OP Members

WACO ISD

CO-OP # S1615
Contact SHERRY SMITH
Address PO DRAWER 27 WACO TX, 76703-0027
Phone # 254/752-8341 x 452
Fax # 254/752-9688
E-mail sherry.trotts@wacoisd.org
Travel Eligible Y
Expiration Date 08-APR-2016

Go to SCHOOL DISTRICTS (lg_web_list_s.html)
Go to Alpha Listing - W (lg_web_list_name_w.html)

http://www.window.state.tx.us/procurement/stpurch/coop_list/s1615.html
# MEAL REIMBURSEMENT DOCUMENTATION

**NAME:**

**RECEIPT DATE:**

<table>
<thead>
<tr>
<th>Breakfast Total</th>
<th>Lunch Total</th>
<th>Dinner Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Allotment: $8.00</td>
<td>Current Allotment: $12.00</td>
<td>Current Allotment: $26.00</td>
</tr>
<tr>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
</tr>
</tbody>
</table>

Receipts must be itemized – Tips are not reimbursable – Sales Tax may not be reimbursable.

WISD Maximum meal reimbursement amount Travel started after July 1, 2015 is $46.00 per
### Travel Mileage Table

**Point to Point Mileage (Waco to Destination City)**

Source: Mapquest shortest route

Reimbursement rate per mile effective January 1, 2015: $0.575

<table>
<thead>
<tr>
<th>Destination City</th>
<th>Mileage</th>
<th>Reimbursement Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One Way</td>
<td>Round Trip</td>
</tr>
<tr>
<td>Abilene</td>
<td>185.14</td>
<td>370.28</td>
</tr>
<tr>
<td>Amarillo</td>
<td>423.91</td>
<td>847.82</td>
</tr>
<tr>
<td>Arlington</td>
<td>92.99</td>
<td>185.98</td>
</tr>
<tr>
<td>Austin</td>
<td>102.30</td>
<td>204.60</td>
</tr>
<tr>
<td>Belton</td>
<td>42.63</td>
<td>85.26</td>
</tr>
<tr>
<td>Bryan</td>
<td>83.11</td>
<td>166.22</td>
</tr>
<tr>
<td>Copperas Cove</td>
<td>66.18</td>
<td>132.36</td>
</tr>
<tr>
<td>Corpus Christi</td>
<td>296.61</td>
<td>593.22</td>
</tr>
<tr>
<td>Dallas</td>
<td>93.90</td>
<td>187.80</td>
</tr>
<tr>
<td>Fort Worth</td>
<td>87.54</td>
<td>175.08</td>
</tr>
<tr>
<td>Galveston</td>
<td>232.22</td>
<td>464.44</td>
</tr>
<tr>
<td>Garland</td>
<td>112.64</td>
<td>225.28</td>
</tr>
<tr>
<td>Gatesville</td>
<td>39.22</td>
<td>78.44</td>
</tr>
<tr>
<td>Grapevine</td>
<td>109.70</td>
<td>219.40</td>
</tr>
<tr>
<td>Hillsboro</td>
<td>32.97</td>
<td>65.94</td>
</tr>
<tr>
<td>Houston</td>
<td>182.30</td>
<td>364.60</td>
</tr>
<tr>
<td>Irving</td>
<td>102.79</td>
<td>205.58</td>
</tr>
<tr>
<td>Killeen</td>
<td>62.66</td>
<td>125.32</td>
</tr>
<tr>
<td>Lewisville</td>
<td>116.69</td>
<td>233.38</td>
</tr>
<tr>
<td>Lubbock</td>
<td>349.60</td>
<td>699.20</td>
</tr>
<tr>
<td>Mexia</td>
<td>40.82</td>
<td>81.64</td>
</tr>
<tr>
<td>Midland</td>
<td>320.65</td>
<td>641.30</td>
</tr>
<tr>
<td>New Braunfels</td>
<td>149.36</td>
<td>298.72</td>
</tr>
<tr>
<td>Plano</td>
<td>112.70</td>
<td>225.40</td>
</tr>
<tr>
<td>Round Rock</td>
<td>83.83</td>
<td>167.66</td>
</tr>
<tr>
<td>San Antonio</td>
<td>179.73</td>
<td>359.46</td>
</tr>
<tr>
<td>San Marcos</td>
<td>132.48</td>
<td>264.96</td>
</tr>
<tr>
<td>Temple</td>
<td>34.95</td>
<td>69.90</td>
</tr>
<tr>
<td>Tyler</td>
<td>127.82</td>
<td>255.64</td>
</tr>
</tbody>
</table>

If the city is not listed on the above list, using Mapquest, determine the mileage using the shortest distance between cities. Then, use the following formula to calculate mileage:

\[
\text{Enter mileage} \times \frac{\text{Reimbursement Rate}}{4} = \text{Total Reimbursement}
\]

4 employees per vehicle per EDGAR Laws & district policy

Revised 4.7.2014
Travel Reimbursement Check List

The items listed are required for reimbursement for all travel. Paper work must be submitted no later than ten working days upon completion of travel to the campus/department and the campus/department has additional five days to enter into TEAMS. This check list must be submitted along with all required paper work.

1. Completed TR-1 Travel Form

2. Must have seminar/conference class brochure, agenda or other information pertaining to details of daily event.

3. Proof of attendance: Name badge or Certificate of completion. (Handouts given in class with notes)

4. Travel mileage table (if mileage is allowable) if location is not on the District Table, use Map Quest map with starting point Waco (no address) to city traveled to.

5. Transportation Fees: Receipts for parking, shuttles, bus, cabs, etc.

6. If air travel need copies of itinerary and appropriate receipts (example baggage) and tickets

7. Hotel receipt and information email from Mary Kay Miller about your hotel & reservation.

8. Itemized meal receipts: Receipts must include items purchased, amount, vendor name, & date. There needs to be 1 Meal Reimbursement Documentation sheet for each day of travel and receipts must be taped to it not more than 1 per meal. Grocery store items are not allowable.

***Day Trip – still require agenda, proof of attendance and mileage table if allowable. Meals are not reimbursed for day trips

The above documentation must be scanned & submitted into TEAMS as an employee reimbursement. If documentation is not submitted correctly it will be sent back.
**Waco Independent School District**

**Out-of-District Travel Request and Reconciliation Form**

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<td></td>
<td>2392.69</td>
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**Breakfast $8**
**Lunch $12**
**Dinner $26**
**Full Day Allotment $46**

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**Employee Signature:**

**Immediate Supervisor's Signature:**

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**Cabinet Signature (for administrators travel only):**

**Superintendent's Signature (for out of state travel only):**

All itemized receipts must be returned to the Business Services Department with this completed form within 10 work days after return from the trip or you forfeit your right for reimbursement.
Love Your Co Workers Conference
Agenda

June 1, 2016
Register 3:00PM – 7:00PM
Mixer 7:00PM – 12:00AM

June 2, 2016
Register 8:00AM – 5:00PM
Key note speaker 8:30AM at Sea World
10:00AM - 5:00 pm Break out sessions

June 3, 2016
Register 8:00AM – 5:00PM
Speaker 8:30AM at Sea World
10:00AM - 5:00 pm Break out sessions
12:00PM Lunch included

June 4, 2016
Register 8:00AM – 5:00PM
Speaker 8:30AM at Sea World
10:00AM - 5:00 pm Break out sessions
12:00PM Lunch included

June 5, 2016
9:00 AM Group Rally at Sea World
11:00AM – 12:00 Final session
Name badge on 1 piece of paper and not on the meal reimbursements
Travel Mileage Table

Point to Point Mileage (Waco to Destination City)

Source: Mapquest shortest route

Reimbursement rate per mile effective January 1, 2015: $0.575

<table>
<thead>
<tr>
<th>Destination City</th>
<th>Mileage</th>
<th>Reimbursement</th>
<th>Reimbursement Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One Way</td>
<td>Round Trip</td>
<td>One Way</td>
</tr>
<tr>
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<td>$38.05</td>
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<tr>
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<td>$59.10</td>
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<td>San Antonio</td>
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<td>359.46</td>
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<td>34.95</td>
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<td>$73.50</td>
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Revised 4.7.2014
<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>06/01</td>
<td>$20.00</td>
</tr>
<tr>
<td>06/02</td>
<td>$20.00</td>
</tr>
<tr>
<td>06/03</td>
<td>$20.00</td>
</tr>
<tr>
<td>06/04</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

Tax $6.60

TOTAL $86.60

Parking needs to be one sheet. Do not put it on the meal reimbursement sheet.
<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Charges</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Room Rate $239.00 X 4 nights</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tax 10.75% 28.92 x 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total $1191.68</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Guest Signature

I agree that my liability for this bill is not waived and I agree to be held personally liable in the event that the indicated person, company or association fails to pay for any part or the full amount of these charges.

Hyatt Gold Passport Summary

No Membership to be credited

Join Hyatt Gold Passport today and start earning points for stays, dining and more. Visit goldpassport.com

Hyatt Regency Hill Country Resort & Spa
980 Hyatt Resort Drive
San Antonio TX 78251

WE HOPE YOU ENJOYED YOUR STAY WITH US!

Thank you for choosing the Grand Hyatt San Antonio. Our goal is to provide you with an exceptional stay. Your feedback is important to us.

We would appreciate your comments being sent directly to Eugene Mardell, Director of Operations at qualitysatisfaction@hyatt.com

For inquiries concerning your bill please call 888-587-4589.

For questions on your Gold Passport account, please call 800-30-HYATT.

Please remit payment to Lockbox 202360 Dallas, TX 75320
Guest please take the attached forms with you to the hotel & check. If you are not going to attend please notify your supervisor and Mary Kay Hopper (room requestor). Deduct Breakfast meal money included with the conference also deduct Lunch on June 3rd & 4th included with conference. (Just a reminder meal receipts for reimbursement must be itemized with what you purchased, amount, restaurant name, & date) Guest must pay for parking (self park is $20.00 per night) & get receipt before leaving.

Please double check to make sure all dates & locations are correct. **********. ********** PLEASE check receipt before leaving the hotel --- no charges are to be left on the district p-card ending 9597 which is used to hold the reservation. ********** Guest is to pay for own parking & meals and be reimbursed as per policy.

Room requestor/Campus/Department, Please do a "Create Check Request" for reservations listed. Reservation will need it's own payment. Remember to check the box by the question "Need Separate Check?" Confirmation #543406 Trendy Traveler sharing with Suzi Slowdown

Request will need all Approvals completed by noon May 16, 2016 in order to have a check on time.

Reservations are at the : Hyatt Regency Hill Country Resort and Spa, 980 Hyatt Resort Drive, San Antonio, TX 78251, (210) 647-1231
Please check that the hotel name is correct when entering on-line check request. Room rate is $239.00 per night per room + resort fee $30.00 + tax per night per room is 10.75% ($28.92) = $297.92 x 4 nights = $1191.68 Total cost room (2 adult person/people per room & 0 children) ******

check in June 1, 2016   check out June 5, 2016

Travel form must have all approval levels before leaving. Review Hotel receipt at check out & turn in copy when you return.

**Will need to take a Hotel Tax Exempt form, Employee Id, State Travel Eligible sheet with you (attached hotel & state travel sheets). Will need to pay parking & any other charges and will be reimbursed on your TR-1 (travel form) for allowable expenses according to policy. You are not to leave any unpaid charges on the districts credit card.** If you should need to cancel the reservation it must be done **96 hours** in advance of check in date, this is the campus & individuals responsibilities - write down cancellation # & name of person you speak with

Mary Kay Hopper-Miller, CTSBO
Purchasing Specialist
Waco Independent School District Admin. Building
marykay.miller@wacoisd.org ***New email***
ph (254) 755-9451
Complete Your Reservation

*Indicates Required Fields

Hyatt Gold Passport Member Sign In (Optional)

Hyatt Gold Passport # / Username

Password

Remember Me

Sign In  Forgot Password | Help Signing in

Guest Name

MS.  

* Given / First Name
Trendy

* Surname / Last Name

Traveler

Contact Information

* Country
United States

* Address
PO box 27

*City
Waco

* State / Province
Texas

* Zip / Postal Code
76703

* Country  * Area Code & Phone Number
1 254-755-9451

* Email Address
marykay.miller@wacoisd.org

Selected Hotel

Hyatt Regency Hill Country Resort and Spa
9800 Hyatt Resort Drive
San Antonio, Texas, 78251, USA

RESORT FEE UPDATE
A daily resort fee of $30 plus tax will be added to your daily room rate and includes 2 complimentary bottles of water per day, golf bag storage, full use of golf practice facilities, bike rental, spa access and more.

Selected Dates and Details Edit

4 Nights: Wed Jun 1 - Sun Jun 5

1 Room: 1 King Bed Room Details
Hyatt Daily Rate Rate Rules
2 Adults / No Child

Summary of Charges

Hotel Currency

Subtotal: $956.00 USD

Additional Fees & Taxes:
Resort Fees $120.00 USD
Occupancy Tax $160.13 USD

Total Per Room**: $1,236.13 USD

** Changes in taxes or fees will affect the total price.
MEAL REIMBURSEMENT DOCUMENTATION

NAME: Trendy Travler

RECEIPT DATE 06-01-16

---

<table>
<thead>
<tr>
<th>Breakfast Total $</th>
<th>Lunch Total $ 20.00</th>
<th>Dinner Total $ 22.98</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Allotment: $8.00</td>
<td>Current Allotment: $12.00</td>
<td>Current Allotment: $26.00</td>
</tr>
<tr>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
</tr>
</tbody>
</table>

---

This meal is denied, because the traveler did not need to leave before noon. (Also this receipt is not itemized)

Molly's Magnificent Menu

1400 Alamo Street, San Antonio TX, 78205 (210)277-4181

---

ARMANDO L. TRANS#: B219982 TERMIN 4

Card Num: XXXXXXXXXXXXXXXX7290

$20.00

SUBTOTAL $20.00

TAX $0.00

TOTAL $20.00

ACCT#: XXXXXXXXXXXX3982 EXP.: XX/XX

CREDIT CARD - $20.00

VISA TENDER AUTH CODE: 074298

CHANGE DUE $0.00

Receipt ID: B8379329839

When you go Home...

---

Receipts must be itemized – Tips are no

WISD Maximum meal reimbursement amount Travel started after July 1,
## MEAL REIMBURSEMENT DOCUMENTATION

### Breakfast Total: $XXXX
- **Current Allotment:** $8.00
- **Deduct Allotment if meal is included with hotel or conference & check this box:** [ ]

### Lunch Total: $12.00
- **Current Allotment:** $12.00
- **Deduct Allotment if meal is included with hotel or conference & check this box:** [ ]

### Dinner Total: $19.49
- **Current Allotment:** $26.00
- **Deduct Allotment if meal is included with hotel or conference & check this box:** [ ]

### Sea World
- **San Antonio TX**
- **Sea Lion Café**
- **Date:** 06/02/16
- **Time:** 12:05PM
- **Whale Burger:** $10.00
- **Cheese:** $1.00
- **ArmBand drink:** $1.00
- **Tax:** $0.99
- **Total:** $12.99

### Antlers Lodge
- **Hyatt Regency Resort**
- **9800 Hyatt Resort Drive, San Antonio, Texas, USA, 78251 (210)647-1234**
- **Date:** 06/02/16
- **Time:** 19:23
- **Texas Quail Ice Tea:** $1.61
- **Total:** $21.10

---

Receipts must be itemized – Tips are not reimbursable – Sales Tax may not be reimbursable.

WISD Maximum meal reimbursement amount Travel started after July 1, 2015 is $46.00 per
<table>
<thead>
<tr>
<th>Breakfast Total</th>
<th>Lunch Total</th>
<th>Dinner Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Allotment: $8.00</td>
<td>Current Allotment: $12.00</td>
<td>Current Allotment: $26.00</td>
</tr>
<tr>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
<td>Deduct Allotment if meal is included with hotel or conference &amp; check this box</td>
</tr>
</tbody>
</table>

Sea World
San Antonio TX
Sea Lion Café
Date 06/03/16 5:10PM
Sea Lion Steak $12.00
Fish Fries $2.50
Arm Band drink $1.00
************************
Tax $1.28
Total $16.78

Receipts must be itemized – Tips are not reimbursable – Sales Tax may not be reimbursable

WISD Maximum meal reimbursement amount Travel started after July 1, 2015 is $46.00 per
MEAL REIMBURSEMENT DOCUMENTATION

NAME: Trendy Traveler

RECEIPT DATE: June 4, 2016

Breakfast Total $ 
Current Allotment: $8.00
Deduct Allotment if meal is included with hotel or conference & check this box X

Lunch Total $ 
Current Allotment: $12.00
Deduct Allotment if meal is included with hotel or conference & check this box X

Dinner Total $ 26.7
Current Allotment: $26.00
Deduct Allotment if meal is included with hotel or conference & check this box

Chama Gaucha Brazilian Steakhouse
18318 Sonterra Place, San Antonio, TX 78258

Date 6/04/16 Table/Guest 4/5 Time 8:00PM

BRAZILIAN BUFFET W/SALAD BAR 44.00
Bev / Water 00.00
Bar / White Wine 16.00

Subtotal 60.00
Tax 5.02
TOTAL 65.02
Gratuity
Total 75.02

Receipts must be itemized – Tips are not reimbursable – Sales Tax may not be reimbursable

WISD Maximum meal reimbursement amount Travel started after July 1, 2015 is $46.00 per

Just a note here, if breakfast and lunch where not included with the hotel and or the conference then the full $46. could be reimbursed on one meal less tips & tax.

When eating with others ask for separate receipts
**MEAL REIMBURSEMENT DOCUMENTATION**

**NAME:**__Trendy Traveler__

**RECEIPT DATE** __June 5__

<table>
<thead>
<tr>
<th></th>
<th>Breakfast Total $</th>
<th>Lunch Total $13.50</th>
<th>Dinner Total $16.50</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Allotment:</strong></td>
<td>$8.00</td>
<td>$12.00</td>
<td>$26.00</td>
</tr>
</tbody>
</table>

Deduct Allotment if meal is included with hotel or conference & check this box

**X**

**Deduct Allotment if meal is included with hotel or conference & check this box**

This meal is denied, the conference is over at noon and travel time back to Waco from San Antonio is less than 6 hours.

---

**Sea World**
San Antonio TX
Grilled Shrimp House
Date 06/05/16 12:10PM
Baby Shrimp Bites $10.00
Fish Fries $2.50
Arm Band drink $1.00
************
Tax $1.11
Total $14.61

**Casa Rio**
430 E. Commerce St,
San Antonio, TX 78205
Date 06/05/16 6:15pm
La Fista Dinner $14.50
Coke $2.00
Subtotal $16.50
Tax $1.36
Total $17.86

Receipts must be itemized – Tips are not reimbursable – Sales Tax may not be reimbursable

**WISD Maximum meal reimbursement amount Travel started after July 1, 2015 is $46.00 per**
With TEAMS, employees can request to be reimbursed or given advanced payments. Once the request is submitted, it must be approved. This document describes this process.

In this document:

Create Employee Advance/Reimbursement Request ........................................ 2
Approve Employee Advance/Reimbursement Requests ...................................... 5
My Employee Advance/Reimbursement Requests .............................................. 7
Create Employee Advance/Reimbursement Request

Use the Create Employee Advance/Reimbursement Request function to create advance/reimbursement requests so that they can be submitted for approval.

1. Navigate to the TEAMS Home page and locate the AP / Cash Disbursement menu.

   **Note:** The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Create Employee Advance/Reimbursement Request** link. The Maintain Employee Advance/Reimbursement Request tab is displayed.

   ![Maintain Employee Advance/Reimbursement Request tab](image)

   **Figure 3.1: Maintain Employee Advance/Reimbursement Request tab**

3. The **Fiscal Year** defaults to the current year, but you can change this, if necessary.

4. The **Requestor** defaults to the person who is signed into the system, but you can change this, if necessary.

5. Select the **Request Type** from the drop-down list.

6. Select an item from the **Supporting Documentation** drop-down list.

   **Note:** If you select Attachment, the tab is redisplayed to show the Browse and Type fields in the Employee Advance/Reimbursement Request Attachments panel.

7. Select the **Payment Type** from the drop-down list.

8. Select an item from the **Route Check** drop-down list to indicate how the check will be routed.

9. Enter a **Justification** for the request.

10. Use the **Needed By** field to enter a date by which the check is needed, or click the **icon to select one from the calendar.**
11. In the Employee Advance/Reimbursement Request Attachments panel, enter the **Amount** of the request.

12. Enter a **Description** of the request.

13. In the **Accounts** field, click the **$** icon to locate an account. The Edit Accounts dialog box is displayed as in the following illustration.

![Edit Accounts dialog box](image)

*Figure 3.2: Edit Accounts dialog box*

14. Enter the account number in the account element boxes, or click the **$** icon to select one from the Account Numbers tab.

   **Tip:** Enter at least one digit into any of the account element boxes and click the **$** icon to filter the search.

15. Select the **Year** from the drop-down list.

16. Select the **Owner** from the drop-down list.

17. The **Prct** (Percent) field is 100 by default. If you are adding one account number, leave 100 in the Percentage field. Enter another percent if you are adding two or more accounts.

   **Tip:** Click the **$** icon to delete an account.

18. **Optional.** Click the **+** icon to add another account number for the request. Repeat steps 14 through 17, and ensure that the Percentage fields for all accounts equals 100.

19. Click the **Ok** button. The account is added to the panel.

20. In the Employee Advance/Reimbursement Request Attachments panel, click the **+** icon to add an attachment to the request. The tab is redisplayed with the File and Type fields displayed, as shown in the following illustration.
21. Click the Browse button to navigate to the file location. Select the type of attachment from the Type drop-down list and click the Add button. The file type and file name are displayed for the document.

   **Note:** Click the + icon to add another attachment and click the icon to delete an attachment.

   **Tip:** Once the attachment is added, you can open it by clicking the icon.

22. Click the Save button. The request is submitted for approval.
Approve Employee Advance/Reimbursement Requests

Use the Approve Employee Advance/Reimbursement Requests function to approve advance and reimbursement requests so that an invoice can be created for them.

How to Submit an Employee Advance/Reimbursement Request for Approval

1. Navigate to the TEAMS Home page and locate the AP / Cash Disbursement menu.

   **Note:** The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Approve Employee Advance/Reimbursement Request** link. The Employee Reimbursement Request Workflow Approval tab is displayed, as in the following illustration.

![Figure 3.4: Employee Reimbursement Request Workflow Approval tab](image)

3. Highlight to select the request, and click the **Approve** button.

   **Tip:** If you want to approve all of the requests in the Approvable Employee Reimbursement Requests list, click the **Approve All** button. If you want to approve most of the items in the list, click the **Select All** button, deselect the item(s) you do not want to approve, and click the **Approve** button.

   The Approval Note box is displayed.
EMPLOYEE ADVANCE/REIMBURSEMENT REQUESTS

Figure 3.5: Approval Note box

4. Enter a brief note in the Approval Note field.
5. Click the Ok button. A message is displayed which tells you that the request was submitted for approval.

   Note: Use the History tab to track the progress of this action.

How to Deny Employee Advance/Reimbursement Requests

1. Highlight to select the request, and click the Deny button. The Denial Note box is displayed.
2. Enter a brief note in the Denial Note field.
3. Click the Ok button. A message is displayed which tells you that the request was submitted for denial.

   Note: Use the History tab to track the progress of this action.
My Employee Advance/Reimbursement Requests

Use the My Employee Advance/Reimbursement Requests function to view information about employee advances and reimbursements that have been submitted for approval.

1. Navigate to the TEAMS Home page and locate the AP / Cash Disbursement menu.

   **Note:** The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **My Employee Advance/Reimbursement Requests** link. The Employee Advance/Reimbursement Request Search tab is displayed.

![Employee Advance/Reimbursement Request Search tab](image)

**Figure 3.6: Employee Advance/Reimbursement Request Search tab**

3. Enter information into any of the following fields to search for employee advance/reimbursement requests:

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year</td>
<td>This field defaults to the current year, but you can change this, if necessary.</td>
</tr>
<tr>
<td>Request Number</td>
<td>Enter the number for the request.</td>
</tr>
<tr>
<td>Requestor</td>
<td>This field defaults to the person who is signed into the system, but you can change this, if necessary.</td>
</tr>
<tr>
<td>Status</td>
<td>Select an item from the drop-down list.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a short description for the invoice.</td>
</tr>
<tr>
<td>Account Number</td>
<td>Enter the account number.</td>
</tr>
<tr>
<td>Needed By Date</td>
<td>Enter the earliest date by which the item is needed, or click the icon to select a date from the calendar.</td>
</tr>
<tr>
<td>Min</td>
<td></td>
</tr>
<tr>
<td>Needed By Date</td>
<td>Enter the latest date by which the item is needed, or click the icon to select a date from the calendar.</td>
</tr>
<tr>
<td>Max</td>
<td></td>
</tr>
</tbody>
</table>
EMPLOYEE ADVANCE/REIMBURSEMENT REQUESTS

Field | Action
--- | ---
Amount Min | Enter the minimum amount by which to search.
Amount Max | Enter the maximum amount by which to search.

4. Click the **Search** button. The Results tab is displayed, as in the following illustration.

![Figure 3.7: Results tab](image)

5. Highlight to select an item from the Employee Reimbursement Request Search Results panel, and click the **View** button. The Maintain Employee Advance/Reimbursement Request tab is displayed, as in the following illustration.

![Figure 3.8: Maintain Employee Advance/Reimbursement Request tab](image)

6. Review the information on the tab.

   **Note:** Click the ▲ to expand the Related Invoices and Related Checks panels.

How to Enter a Note for an Employee Advance/Reimbursement Request

1. On the Results tab, highlight to select an item from the Employee Reimbursement Request Search Results panel, and click the **Notes** button. The Notes tab is displayed, as in the following illustration.
Figure 3.9: Notes tab

2. In the Notes field, enter any free-text comments, up to 500 characters.

3. In the Private field, select Yes to indicate that this note is private; select No if the note is not private. No is the system default.

   Note: If a note is designated as Private, then only the person entering the note has access to it. No information about the note is displayed for other users.

4. In the Internal Only field, select Yes to indicate that this note is for internal use only; select No if the note is not only for internal use. Yes is the system default.

   Note: Selecting Yes in the Internal Only field indicates that only district employees have access to the note.

5. Select the Communication Method by which you received the information.

6. Click the Add button. The note is added to the Notes list.

7. Click the Return button to return to the tab on which you were working.

How to Edit an Existing Note

Highlight it in the Notes list and click the Edit button. Make any changes, and click the Save button.

How to Delete a Note

Highlight it in the notes list and click the Delete button. The system displays a message asking you to confirm the deletion action. Click Yes to delete the note.