



Pearson Virtual Schools Travel & Expense Policy

Applies to all School Staff.

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Introduction

This policy outlines the requirements pertaining to expenses incurred on behalf of your school while traveling or conducting the requirements of your job. All how-to documents and training materials referenced within this document can be found on the [Home](#) > [Employee Resources](#) > [Finance Resources](#).

This policy applies to all school staff and provides guidance on incurring and submitting expenses. When booking travel & expense, compliance is mandatory. Non-compliant expenses will not be reimbursed. Cash or out-of-pocket expenses will be reimbursed through the Travel and Expense ("T&E") reimbursement process, as described in this document. Based on local school requirements, more stringent restrictions may apply.

Schools with a Board approved Fiscal Policy must adhere to that policy as their primary guidance. If there is a conflict between this policy and a Board approved Fiscal Policy, the Board's policy supersedes this one. Board approved fiscal policies are available in on the [Virtual Library](#).

Guidelines

When traveling or accepting the responsibility of incurring expenses on behalf of your school, you are asked to seek a balance between cost, convenience, safety, and comfort. We ask everyone to use their judgement to make reasonable decisions that reflect the intent of this policy.

As an employee, you are responsible and accountable for:

- Being fiscally responsible,
- Complying with all aspects of this policy,
- Submitting expense reports within 30 days of incurring the expense,
- If you are traveling with several staff, the most senior member must pay, and
- Taking personal responsibility for your safety and security when traveling.

School travel is defined as travel to or from a temporary workplace (for example: conference, field trip, state testing site, or work-related events) school staff visit for the purpose of performing their job duties. School travel does not include travel for personal, non-business purposes, or standard commuting to an assigned office. Travel will normally start or end at the school location or from your home.

Costs associated with travel between your home and your regular place of work (ordinary commuting) are regarded as routine and will not be reimbursed. Each person will have an established primary place of work.

Home-based Staff

Mileage

Home-based Staff:

As a home-based staff member, you are not required to commute to an office to perform your job. As a result, when you are required to travel for school purposes, you will deduct the first 60 miles of each day's travel as an offset to standard commuting mileage.

The first 60 miles of each trip are not considered reimbursable. They are considered a substitute for standard commuting mileage (representing an average one-way commute of 30 miles).

To qualify for reimbursement, you must specify the purpose of the trip and enter the trip origin and destination in the Concur mileage calculator. If a mileage deduction is required, the number of miles travelled, as calculated by the Concur mileage calculator, less 30 miles for each segment of the trip must be manually entered.

Office-based or Flex Staff:

Office-based and Flex staff who are required to report to their assigned office location on a regular basis (e.g., once a week, once a month) will not be reimbursed for travel to and from that location. All other travel will be reimbursed in accordance with this policy.

Mail

Home-based staff may request reimbursement for unusual, excessive costs (typically defined as greater than \$5.00) incurred in mailing materials. A receipt from the carrier is required for reimbursement.

Home Office Costs

Home-based staff are responsible for all costs and expenses associated with the setup of a home workspace. These include costs associated with remodeling, furniture, lighting, repairs, modifications, etc. Maintenance costs and liability for employee-owned equipment and furniture is the responsibility of the employee.

Home-based staff should speak with their manager during office visits to gather the necessary pens, paper, notebooks, etc.

School Credit Cards

It is anticipated that staff will incur expenses eligible for reimbursement during the course of employment as a direct result of job requirements. Approved expenses are reimbursable as outlined in this policy. If, because of your role, you have the need to seek reimbursement for reoccurring expenses, you may request a school credit card. Guidance on how to make that request is found [here](#). Your school leader must approve your request for a school credit card. All expenses incurred on this card must be remitted within 30 days of the card swipe and with the appropriate proof of purchase or your card will be suspended. Failure to follow the policies related to travel and expense may result in suspension of the credit card and/or disciplinary action, up to and including termination.

Credit card use expectations:

- You must submit all expense for approval within 30 days
- Every expense must be an approved/allowed expense incurred directly for the school (this includes your travel for school related business)
- You may NOT make a purchase for another staff member using your card with the exception of a shared meal. The most senior person should pay.
- Every purchase requires a detailed, itemized receipt

- You may not purchase alcohol with your credit card
- You may not purchase gas for your personal vehicle with your credit card

Out of Pocket Expenses

If you are traveling or conducting other school business and incur an out-of-pocket expense, you must submit for reimbursement of that expense within 30 days. Failure to do so will result in your expenses not being reimbursed. To submit for an out-of-pocket reimbursement, follow the [directions](#) found on the virtual library. Expense reimbursements are processed through payroll within 10-15 days of their approval. Reimbursements will be processed using the same process (direct deposit or live check) as your regular payroll.

Expenses are expected to be related to travel which might include meals, hotels, and transportation. Supplies and other items for the school will be purchased by the school's purchasing team. The [school purchasing policy](#) is available on the virtual library.

Out of pocket expectations:

- You must submit all requests for reimbursement for approval within 30 days
- Every expense must be an approved/allowed expense incurred directly for the school (this includes your travel for school related business)
- You may not make purchases on Amazon, Target or other major retailers without written approval from your manager. This approval must be included with your expense report
- Every purchase requires a detailed, itemized receipt
- You may not purchase alcohol and request reimbursement
- You may not submit for reimbursement for gas if you have submitted for mileage reimbursement

Travel Booking Resources

Pearson Virtual Schools provides travel booking resources and discounts through the [Concur](#) Online Booking Tool (OBT). When making air, hotel, and car rental reservations, the OBT should be the method used to book your travel. If your travel cannot be arranged through OBT, please seek approval from your School Leader or Manager to book outside of the OBT.

Your school may provide travel booking support for major school-wide events like back to school and testing. If this is the case, you are required to provide your supporting documentation (hotel folio, rental car receipts, etc.) to the administrator who booked the travel within 5 days of the end of your trip.

If you are required to make your own travel arrangements, please be advised of the following requirements.

Personal & Companion Travel

You cannot use the OBT to book personal travel. Personal travel made as an extension to a required trip will require approval of your manager in advance of booking and can only be approved if no additional cost is incurred by the school. You must pay for all personal expenses on a personal credit card, and not on a school issued card. Rental cars cannot be extended as our insurance does not cover personal trips. You would need to turn the car in and book a personal rental.

Advanced authorization from your manager is required for spousal, family and companion travel that is connected to an approved trip, and for which you are using the OBT.

Air Travel

If you have a school credit card, you should use it to book air travel. If you do not have a card, your school's Purchasing Representative can book your travel arrangements for you.

Lowest logical fare

Pearson has negotiated discounts with major airlines. The lowest cost option will always be identified by the OBT at the time of booking. Pearson will always ensure the options presented are with reputable airlines that have a good safety record. The lowest cost fare must be accepted at the time of booking, regardless of airline preference. The lowest fare will be based upon comparable flight schedules within a two-hour window of requested departure and arrival times. Price tolerances are programmed into the booking systems to avoid you having to make unreasonable connections for the sake of a minimal difference in cost.

First class travel should not be booked at any time.

Non-refundable and penalty fares

All staff are required to book the lowest non-refundable fare available at time of booking and should only consider Economy or Coach Class. You must accept flight options that allow for unused tickets to be re-used.

Online bookings should be cancelled online. The OBT will manage the process to reuse the bookings.

If you need to change or cancel your tickets for business reasons, you can claim the cost back through expenses.

Cost saving tips

- Make reservations at least 14 days in advance to take advantage of the lowest fares.
- Alternative airports: consider alternative airports where appropriate.
- Connections: consider taking a connecting flight as an alternative to a direct flight, where it would provide a material saving and the additional travel time is not significant or disruptive.
- Arrive earlier or leave later: consider arriving at your destination a day earlier or leaving a day later where this does not inconvenience you personally, and if the savings made on an airline ticket price outweighs the cost of an additional night's accommodation and meals.

Additional airline fees

Checked bags fees are reimbursable. All other fees such as priority boarding, additional legroom, or advanced seating are not reimbursable. For trips longer than one week, your manager may approve excess baggage fees.

Hotel/Accommodations

You should always make reservations based on the lowest rate, rather than any associated loyalty program benefits. All staff should book standard rooms. Every staff member should book their own room (no sharing). You may apply your personal rewards account information to participating hotels for your room only. Your school Purchasing Representative can book a hotel stay on your behalf if you do not have a school credit card.

Lodging expenses must be substantiated by a hotel folio showing the name and address of the establishment, the dates of occupancy, and the daily itemized cost of the accommodation, in addition to a credit card receipt or other proof of payment.

Rental properties, such as Airbnb/VRBO are not permitted.

If travel plans change, it is the traveler's responsibility to cancel hotel reservation to avoid penalty charges. If there is a business reason for the no-show, it should be documented in your expense report.

Ground Transportation

You should select the lowest cost option for ground transportation. This could include using your own vehicle, car, subway, licensed taxis/car service, buses, and hotel or airport shuttle. When you are traveling with other staff, you should share transport where possible. The most senior person is required to pay.

Car rental

Pearson has negotiated discounted rates with preferred vendors. Car rental reservations may be made through the OBT to guarantee adequate insurance. If the reservation is not booked via OBT, it is important to provide the vendor with Pearson's corporate code found in [Car Rental Discount Rates](#), otherwise this will be considered a private rental, and you will be liable for any damage costs arising and the costs will not be reimbursed.

You should decline collision insurance or personal accident insurance coverage when renting from a preferred supplier (excluding Alaska, Hawaii, and Puerto Rico). Preferred rates include loss damage waiver insurance, provided:

- The loss/damage or liability does not arise out of prohibited use.
- The Pearson ID Number is noted on the rental agreement.

Booking with a non-preferred supplier is only permitted when the preferred supplier is sold out or there is no preferred supplier for your location.

In the event of an incident where an injury has occurred, please contact your dedicated HR support team at: {Your school acronym}HR@pearson.com. For any non-injury related incident, please create an IA under the system: Business and Compliance Services / Component: Insurance Inquiry / Type: Other.

Class of vehicle

You must select a vehicle class that is intermediate / mid-size or smaller. If you need an upgraded car class (including larger vehicles where you are transporting equipment or materials or when three or more staff are travelling together and share a car), the rationale should be documented in your expense report. Sports car rentals are not allowed.

Returning Rental Cars

Return rental cars with a full tank of gas. Advance purchase refuelling options sold by the rental car companies are not cost effective and should be declined. You may use your school credit card to refuel the rental car.

Many car rental companies provide toll transponders in their vehicles for a daily service fee. It is suggested that traveler not use this service. If using toll roads during a business trip, Pearson will reimburse the traveler for any out-of-pocket expense when accompanied by an itemized receipt.

Traveler is responsible for all travel fines and penalties.

Personal car use

You will be reimbursed for authorized business use of a personal vehicle. A suggested 'per mile' reimbursement rate is established at the beginning of each year based on IRS Guidelines. This rate covers all expenses (gasoline, oil, repairs, insurance, etc.), except for parking and tolls.

- A standard commuting mileage deduction of 30 miles for each segment of your trip is deducted when calculating the number of miles traveled when you are designated as work from home.
- Staff using their personal cars for business purposes are entitled to reimbursement for expenses incurred. Expenses such as parking tickets, fines, accidents, tows, theft and wear and tear will not be reimbursed and are the responsibility of the employee.
- If staff use their personal car on Company business, it is mandatory that they have minimum Bodily Injury and Property Damage insurance protection as required by applicable state laws. The company will not reimburse staff for personal property damage or injury, including deductible amounts, incurred while using a personal auto. Third party injury/property damage incurred while using their personal automobile should be covered by the staff member's personal auto insurance policy (as required above).
- To receive reimbursement for mileage, **the staff member must:**
 - specify the purpose of the trip, trip origin and destination,
 - using the mileage calculator in Concur,
 - Home-based staff must then deduct 60 miles from this calculation (30 for each segment of the trip).
- Staff will be reimbursed using the current IRS standard mileage rate. This is subject to change.
- You can never use your school credit card to pay for gas for your personal car.
- standard commuting mileage to and from the staff's designated home office are not reimbursable.

Other Expenses

Meals

You can claim back for the reasonable cost of meals during travel. The cost of your meals should not be excessive, and you should choose venues that are suitable for business purposes. It is

critical that you manage the total cost of meals and tips as reimbursement for meals and other expenses are made with school and state funds, which are reportable to stakeholders.

If there is more than one staff member present, the most senior level staff member must pay for the expense. Meals purchased for anyone not employed at the school must comply with your school's gift policies.

An itemized receipt must be submitted. This itemized receipt must include the details of the meal as well as the tip provided. The attached receipt must match the request to be reimbursed. The credit card receipt alone is not sufficient. The expense report must include the following details:

- Date of meal, including the year
- Name and title of each attendee
- Business reason for meal including description of meal
- Cost of meal

Food delivery service receipts must include the full date (including the year).

Some charter schools have implemented a maximum daily spending limit for meals while traveling. If this applies to your school, you must adhere to the cap and submit all required receipts.

Other charter schools have implemented a per diem for meals while traveling.

All staff in service to that school are subject to the per diem/ daily cap established.

Please contact your School Leader to confirm if a daily spending limit or a per diem applies to your school.

Alcohol

Alcohol is non reimbursable and should not be charged on your school credit card or submitted for reimbursement on an out-of-pocket expense report. If alcohol is purchased, you must request a separate receipt.

Tips

You can submit for reimbursement the cost of reasonable tips that are in line with local customs and do not exceed 20% of the total bill. You should review the bill closely to ensure that a tip has not already been included before adding it.

Miscellaneous items

Subscriptions and membership fees should be restricted to publications and professional organizations necessary for your role and require manager approval prior to subscribing.

The purchasing of basic goods, office supplies, gifts (for students or other staff), prizes for events, etc. are not permitted without prior written permission from your School Leader. For purchases exceeding \$50, the School Leader is ultimately responsible for determining if the purchase is allowable and approving this purchase. If the School Leader is unsure, please submit an IA to the Compliance Team for guidance.

Receipts

A detailed, itemized receipt is required for all credit card purchases and cash/out of pocket expense reimbursements. In the rare event a receipt cannot be provided, a Lost or Destroyed Receipt form must be completed. Details about the payee, date, location, business purpose and amount of the expense must be identified on the form.

Requirements of Approvers

If you are at manager level, you may be required to approve an expense report. You are responsible and accountable for:

- Ensuring the necessity and validity of the expense,
- If appropriate, confirming the receipt of the item,
- Ensuring staff comply with these guidelines, and
- Thoroughly reviewing each expense claim and its associated receipt prior to approving it.

For all expenses exceeding \$5,000 two approvers are required, and the expense report will be escalated for additional approval in Concur. One approver must be the School Leader.

Acknowledgement of Policy

I acknowledge that:

I have read and understand the policies contained in this travel and expense policy and I agree to abide by all policies as well as immediately report any perceived violations of policies to my manager and/or Human Resources.

I understand that failure to submit all expenses within 30 days of incurring the expense may result in the revocation of my school credit card and/or the denial of my expense reimbursement.

I understand that I have access to and can obtain a copy of this policy at any time online in the Virtual Library.

I understand and agree that I am responsible for knowing and understanding the contents and abiding by the policies set forth in this travel and expense policy.

I understand that all policies may be unilaterally changed, amended, modified, reduced, or discontinued at any time in Pearson Virtual Schools' sole judgment and discretion.

I understand that any amendment of the travel and expense policy will always govern and supersede any prior versions.

I understand, that if I should have questions or concerns regarding the travel and expense policy, I should contact my manager.

I understand that the Pearson Virtual Schools has the right to use disciplinary action for any violation of policy or perceived violation of policy.

****For Managers Only**** I understand it is my fiscal responsibility to review every expense report in a timely and thorough manner, ensuring the necessity and validity of every purchase and ensuring the required documentation and justifications are submitted on time.

You will be directed to acknowledge this policy via electronic signature upon beginning employment and every year thereafter.