

Central Union High School District

Travel Expense Claim

Claims must be submitted to the school site or department secretary no later than **15 business days** after the travel takes place. **LATE CLAIMS WILL NOT BE PROCESSED.**

Name: _____ Phone: _____

Address: _____ Select your check Mail
delivery option Pick-up

Name of Conference/Workshop: _____

Date(s): From: _____ To: _____ Total Days: _____

Location: _____

MILEAGE: If claiming mileage, please indicate the name(s) of other persons who traveled in your vehicle with you if applicable. If not applicable, indicate N/A.

Expenses that are not accompanied by a receipt will not be paid.

DETAIL OF EXPENSES				Total
Transportation: Taxi, shuttle, parking, rental car (if approved)				\$
Private Vehicle Use Dates:	From:	To:		
Total miles:		@	/mile	\$
Lodging (w.prior approval)		days @	\$ per day	\$
Other: (describe)				\$
MEALS: Total reimbursement shall not exceed \$64 per day. For partial days reimbursements amounts shall not exceed: \$14/breakfast, \$18/lunch, and \$32/dinner DO NOT CLAIM MEALS INCLUDED WITH REGISTRATION				
Date	Breakfast	Lunch	Dinner	\$
				\$
				\$
				\$
				\$
TOTAL AMOUNT CLAIMED				\$

To be completed by District Office

Charge To: _____

CLAIMANT'S SIGNATURE: _____

DATE: _____

PRINCIPAL APPROVAL: _____

DATE: _____

DISTRICT APPROVAL: _____

DATE: _____

GUIDELINES AND INSTRUCTIONS

- I. **Conference Request Forms** must be completed any time a staff member desires to participate in a professional development activity at district expense or during contract time. This includes workshops conducted within the school district on a regular school day.
 - A. When more than eight persons are attending the same conference/workshop, an additional page that includes the participant names and signatures may be attached.
 - B. The conference/workshop registration forms and district Conference Request Form must be fully completed by the participant(s). The conference/workshop announcement must be attached. Incomplete forms will be returned to the school or department.
 - C. Conference requests must be approved by the principal, principal's designee, or department director (Human Resources, Business, Food Services, Maintenance or Transportation) prior to being forwarded to the district office for approval by the Assistant Superintendent and/or Superintendent.

- II. **Travel Arrangements** (including registration, hotel and flights) will be made by the district unless extenuating circumstances necessitate that the employee do so. In such cases, the employee must receive approval from the district prior to making any arrangements.
 - A. If the employee desires the use of a district vehicle, he/she must complete a vehicle request form and submit it with the conference/workshop request. In the event that there are no district vehicles available, employees will need to travel by private vehicle.
 - B. If an employee decides to cancel a planned conference/workshop, the employee will be responsible for any expenses incurred by the district as a result of the cancellation.
 - C. Employees will be responsible for additional charges due to changes in flights, unless it is an emergency.

- III. **Travel Expense Claims** must be submitted to the school site or department secretary **no later than 15 days** after the travel takes place. It is the employee's responsibility to ensure the form is date stamped upon submission. **LATE CLAIMS WILL NOT BE PROCESSED.**
 - A. **Meals** - The district will reimburse on a per diem basis for meals up to \$64 per full day, and for partial days at the rate of up to \$14/breakfast, \$18/lunch, and/or \$32/dinner. **Itemized receipts are required for same-day out-of-county travel. NOTE: Based on IRS rules, all same-day meal reimbursements are considered income and will be reflected on employee W-2s.**
 - B. **Ground Travel** (shuttles/taxis/parking/etc.) - The district will reimburse for all reasonable costs related to transportation. Employees shall make every effort to secure the least expensive transportation alternative. Employees may not make rental car arrangements without prior district approval. **RECEIPTS ARE REQUIRED.**
 - C. **Other** - The district will reimburse for the purchase of conference related materials or supplies only if such purchases have been approved in advance by the principal or department director. The district will not reimburse for dry cleaning/laundry services, alcoholic beverages, entertainment, transportation for personal enjoyment during non-conference hours, or other costs associated with non-conference activities.

- IV. **Follow-up and information sharing.** All individuals who have attended conferences and workshops are to complete a Conference/Workshop Report within 30 days following conference attendance and submit it to the principal.
 - A. Staff members are expected to disseminate information gained through oral/written reports at meetings, sharing copies of materials or providing in-services. A person desiring to share information at a staff meeting, DIT meeting or workshop should consult with the principal to make the proper arrangements.

Revised: November 2015

Business and Noninstructional Operations**TRAVEL EXPENSES**

The Board of Trustees shall authorize payment for actual and necessary expenses, including travel, incurred by any employee performing authorized services for the district. The Board of Trustees shall establish a per diem allowance for meal costs incurred while traveling on district business. The established per diem allowance for meals is \$64. The individual meal allowance for partial days is as follows:

\$14 for Breakfast

\$18 for Lunch

\$32 for Dinner

The Superintendent or designee may approve employee requests to attend meetings, workshops and conferences in accordance with the adopted budget.

(cf. 4131 - Staff Development); (cf. 4131.5 - Professional Growth); (cf. 4231 - Staff Development); (cf. 4331 - Staff Development)

Expenses shall be reimbursed within limits approved by the Board. The Superintendent or designee shall establish procedures for the submission and verification of expense claims. He/she may authorize an advance of funds to cover necessary expenses.

The Board may establish an allowance on either a mileage or monthly basis to reimburse authorized employees for the use of their own private vehicles in the performance of assigned duties.

All out-of-state travel shall have prior Board approval. Travel expenses not previously budgeted shall also be approved on an individual basis by the Board.

Authorized employees may use district credit cards while attending to district business. Under no circumstances may personal expenses be charged on district credit cards.

Legal Reference: EDUCATION CODE: 44016 Travel expense; 44032 Travel expense payment; 44033 Automobile allowance

Business and Noninstructional Operations**TRAVEL EXPENSES****Out-of-Town Travel****Travel Approval:**

Conference Request Forms must be completed and approved in advance. Out-of-town travel, including out-of-state travel, must be pre-approved by the immediate supervisor with final approval by the Superintendent or designee. The employee shall provide specific information regarding the travel (i.e. meeting/conference/workshop notice).

Lodging:

Lodging is approved for out-of-town travel when the professional meeting, workshop or conference is a minimum of 75 miles from the district and begins at a time which would require the employee to depart earlier than 6:30 a.m. or ends at a time which would require the employee to arrive home later than 8:30 p.m. All lodging arrangements will be made by district personnel unless otherwise approved by the Superintendent or designee.

When more than one employee of the same gender attends, rooms must be shared by at least two persons. An employee who requests a separate room will be responsible for any and all additional costs incurred by the district as a result of the request.

Meals:

The Board of Trustees has established a per diem allowance for meal costs incurred while traveling on District business to a maximum of \$64 per day. For partial days, reimbursement shall not exceed:

\$14.00 for breakfast

\$18.00 for lunch

\$32.00 for dinner

Employees must be required to depart from home before 7:00 a.m. to qualify for breakfast reimbursement and arrive home after 6:00 p.m. to qualify for dinner reimbursement. Meal receipts for overnight stay travel are not required to be submitted in order to receive the per diem allowance. Same day travel meal receipts are required for reimbursement of actual meal cost not to exceed the established per diem amount. A period of 15 business days will be allowed for submittal of travel expense claim for reimbursement. Same day travel receipts must accompany claims.

All meals that are included as part of a package, such as with registration of a meeting or an in-flight meal on an airline, are not subject to reimbursement.

No reimbursement for alcoholic beverages will be allowed.

Travel Reimbursement Procedures:

1. Conference Request Forms must be completed and approved in advance accompanied by information regarding the travel (i.e. meeting notice).

2. Travel expense claims shall be submitted within 15 business days after the travel occurs with receipts and/or supporting documents. It is the employee's responsibility to ensure that the Travel Reimbursement Form has been accurately completed, delivered to the school secretary and date stamped within the 15 day period.
3. Claims submitted late will be subject to disqualification for reimbursement.

Incidentals:

Incidental costs associated with transportation (e.g. shuttles, taxis, parking) are reimbursable on a substantiated basis (receipts required).

Transportation:

1. When an employee is required to travel by private car, the employee will be reimbursed at the current district rate. If two or more persons are traveling by private car to the same destination, transportation must be shared. Reimbursement shall be made to the person who shares his/her private vehicle for the transportation. If shared transportation is available, and a staff person chooses to take his/her own vehicle, he/she will not be reimbursed mileage.
2. The number of reimbursable miles shall be based on the distance to/from the workplace site to/from the out-of town destination. When an employee's travel originates from or ends at his/her personal residence, the total mileage will be based on the distance from the workplace or from home, whichever is less. Mileage for travel for personal purposes at the out-of-town location is not reimbursable.
3. An employees authorized to drive his/her own car on official business must certify on the Conference Request Form that he/she is maintaining minimum liability car insurance and a current California Driver's license.
4. The district may consider using rental cars for out-of-town trips if the total cost, including insurance, would be less than the district mileage reimbursement and no appropriate district vehicle is available. Car rental agreements must include insurance coverage by the rental agency. District insurance does not cover car rentals.
5. When a staff member chooses to use their private means of transportation to a distant meeting rather than fly, the maximum mileage reimbursement allowed shall not exceed the cost of the round trip mileage to San Diego plus the usual airfare and related transportation costs.
6. Airline tickets shall be purchased through the purchase order process unless otherwise approved by the Superintendent. The district will reimburse only for the cost of coach or equivalent fare. Employees will be responsible for additional charges due to changes in flights, unless it is an emergency.
7. Car rentals at out-of-town destinations will be allowed only when other means of transportation such as shuttles or taxis would be more costly. Car rentals should be approved in advance unless it is an emergency.
8. Employees are responsible for moving and stationary vehicle violations. No reimbursement of fines/penalties will be claimed or paid by the district.

Student Travel

Expenses for student travel, including transportation, lodging and meals shall be paid for by the student through fundraising, booster club contributions or self funding. Except for the following:

Transportation to athletic competition or practice scheduled as part of the regular season.

Transportation to post season athletic competition and post season out of town extra curricular competition.

Reimbursement for meals or lodging necessitated because of out of town travel. The authorization for reimbursement must receive advance approval from the superintendent, be limited to actual expenses, and be within the adopted budget.

Local Travel:

Mileage Reimbursement Rate:

The district's mileage reimbursement rate is linked to the Internal Revenue Services maximum tax-exempt reimbursement, as approved by the Superintendent. The rate includes reimbursement for vehicle wear and tear.

Insurance/Driver's License:

Employees must maintain minimum liability car insurance and a current California Driver's License in order to receive reimbursement for mileage. Employees must certify on all claim forms that this information is current.

Reimbursable Mileage:

Employees are not reimbursed for traveling from home to their work site, nor from their work site to home at the end of the workday although the work site may vary. Employees may claim the following authorized mileage:

- * Travel from work site to one or more authorized destinations
- * Travel from home to a location other than the established work site provided the claim is for the lesser mileage:
- * From home to the destination; or
- * From the established work site to the destination

Mileage Reimbursement Procedures:

All in-county travel must be recorded on a Monthly Mileage Report claim form.

The Monthly Mileage Report claim form shall be submitted on a monthly basis to the immediate supervisor no later than thirty (30) days after the end of the month. Claims filed after thirty (30) days will be subject to disqualification for reimbursement.

REVISED: November 10, 2015