

Travel & Conference Procedures

- Step 1:** Employees complete a Conference Attendance and Reimbursement Request form at least ten days prior to travel and obtain approval (be sure to include the conference brochure or agenda w/form). Contact Purchasing to order a Credit Card in the Travelers Name.
- Step 2:** One requisition is entered in Escape using the U.S. Bank [Vendor #002801] as the Vendor. On one purchase order detail: 1) lodging, 2) conference registration, 3) car rental, and 4) estimated fuel.
- Step 3:** Call hotel to make reservations, register for conference, call Enterprise to reserve vehicle.
- Step 4:** The day before travel bring the signed copy of the purchase order to the Purchasing Office to check out a Travel Card.
- Step 5:** Save all receipts in the travel pouch provided.
- Step 6:** After completion of travel, return Travel Card, receipts and pouch to the Purchasing Office.
- Step 7:** Reconcile the Conference Attendance and Reimbursement Request form and submit all expenses not paid for with the travel card for approval by the supervisor.

Lodging: Individuals on approved travel and requiring overnight lodging shall be reimbursed for the actual necessary lodging expenses supported by receipt including parking. Lodging requests may not be approved for travel under a 75-mile radius of the District unless approved by Superintendent or Assistant Superintendent.

Transportation: Travel reimbursement will be made for travel to/from Assigned Job Site and other job locations. If mileage reimbursement is requested and not part of a Conference Attendance and Reimbursement Request form, employees may use the Mileage Claim Form available on District website: www.smbds.org > **Business Services** > **Travel & Conference**

The Assigned Job Site for claiming travel and per diem allowance is that designated on Employment Contracts for certificated, management and classified employees. The Assigned Job Site is the location to and from which mileage reimbursement is authorized. If the employee reports directly to or returns from the job/travel location without first reporting to the Assigned Job Site, travel mileage is calculated from/to the Assigned Job Site or home, using actual mileage for the travel. The reimbursement rate is the current IRS standard mileage rate 62.5¢.

- Mileage for any official travel including non-work days will be reimbursed.
- An individual using his or her vehicle on extended trips outside the district shall be reimbursed not to exceed the amount which would have been expended if the employee had used coach or economy air transportation and any required shuttle or taxi.
- If dropped off and picked up at a common carrier and no parking expense is claimed, mileage to and from the common carrier may be claimed at the above appropriate rate.
- Actual and necessary parking expenses shall be allowed.

Car Rental: SMBSD uses Enterprise Car Rental as the district has state contract that saves money and also provides insurance coverage. Car rentals can be very cost effective and may save the district money when comparing use of personal vehicles (mileage) versus car rental rates (daily rate plus gas). If you are unsure which method to choose, please contact the Business Office for assistance. The Car Rental process is provided on our website: Business > Accounts Payable > Travel and Conference.

Meal Allowances: Individuals on approved travel shall be reimbursed for meals upon submission of the Conference Attendance & Reimbursement Request.

Important note - Travel Cards may not be used for room service, meals, drinks, alcoholic beverages, or incidentals. Full meals included in airfare, hotel, and conference fees, or otherwise provided, may not be claimed.

| Travel Duration | Meal (Three meal maximum in one 24-hour period) | Per Diem (Flat Amount) | Actual Expenses (Actual Amount) |
|---|---|---------------------------|---|
| Travel prior to 6 a.m. and ends at or after 9 a.m. | Breakfast may be claimed | \$14 | Actual expenses can be claimed for any permitted meal when a receipt is included with the travel claim. Note: Gratuities may be included in the expenditure for actual expenses not to exceed 15%. |
| Travel began prior to 11 a.m. and ends at or after 2 p.m. | Lunch may be claimed | \$18 | |
| Travel began prior to 4 p.m. and ends at or after 7 p.m. | Dinner may be claimed | \$25 | |
| In-county Reimbursement: will only be paid for meals that are a part of a called meeting; i.e., an official conference/ official meeting which includes a meal (include official notice or receipt for reimbursement). | | | |

The Business Department audits claims for computational accuracy and necessary documentation, requests the warrant, and forwards the warrant to the employee. The Superintendent or Assistant Superintendent reserves the right to make exceptions to the above regulations.

Questions regarding reimbursement of travel expenses should be directed to
Business Services (805) 361-8136 / 4617 or Purchasing (805) 361-8176 / 5996.
Report lost Travel Cards to Purchasing immediately.