

Hayward Unified School District
TRAVEL & CONFERENCE PROCEDURES

BEFORE THE CONFERENCE/WORKSHOP

4-6 weeks prior to the conference/workshop:

- [] Complete the *Travel and Conference/Workshop Pre-Authorization* form and obtain proper signatures. The current forms are located on the HUSD website <http://www.husd.us/accounting>
- [] Attach completed conference/workshop registration form to the Pre-Authorization Form.
- [] Attach background information on conference/workshop (description, dates, place cost) to the Travel & Conference pre-authorization form
- [] Complete (and obtain appropriate signatures) *Purchase Requisitions* for:
 1. Conference registration.
 2. Hotel registration
 3. Airline reservations
- [] Attach the *Travel and Conference/Workshop Pre-Authorization* Form, along with the completed conference registration form to the Purchase Requisitions to be submitted to Purchasing **4-6 weeks prior to the conference/workshop.**

NOTE: *Remind* attendee(s) that **all original itemized receipts must** be obtained even if charged to District credit card, such as airline receipt showing attendees name and cost of ticket; hotel folio/receipt for lodging showing zero balance and detail of all costs charged to the room; receipts for parking, shuttle, taxi, etc. Make sure that the amount paid is on the receipt.

Proof of conference attendance—badge or certificate of attendance is required.

Hayward Unified School District
TRAVEL & CONFERENCE PROCEDURES

AFTER THE CONFERENCE/WORKSHOP

- [] ***Travel & Conference/workshop Expense Sheet:*** The attendee must complete the current form from the HUSD website <http://www.husd.us/accounting> Travel & Conference/Workshop Expense Sheet within 30 days following the conference/workshop.
- [] The following items are to be attached:
1. All original receipts for all expenditures such as airline receipt, hotel receipt, and conference/workshop registration receipt, receipts for parking, shuttle, etc. taped to 8 ½" X 11" sheet of paper
 2. Copy of the Travel and Conference/Workshop Pre-Authorization Form
 3. Proof of conference/workshop attendance - name badge or certificate
- [] Review the Expense Sheet for accuracy (i.e. expense figures must match the amount listed on the pre-authorization form).

DETAILED INSTRUCTIONS FOR EXPENSE SHEET:

1. **MEALS AND LODGING--No receipts necessary for meals because they are ONLY paid at per diem rate.**

PER DIEM AMOUNTS ARE AS FOLLOWS:

Breakfast \$7.00 Lunch \$11.00 Dinner \$23

Meals and lodging will be paid provided the travel time meets the following requirements

- Breakfast: Breakfast may be claimed if travel began at or prior to 7:00 a.m. and terminated at or after 9:00 a.m.
 - Lunch: Lunch may be claimed if travel began at or prior to 11:00 a.m. and terminated at or after 2:00p.m
 - Dinner: Dinner may be claimed if travel began at or prior to 5:00 p.m. and terminated at or after 7:00 p.m.
2. **LODGING** – Write in lodging cost for each day. An itemized original receipt is required even if paid with District credit card. Proof of payment must be provided if the District did not pay. The District will pay for a standard room or the room provided with a group discount, whichever is less. Upgrades are not reimbursable.
3. **REGISTRATION** – Enter the amount even if paid by the District. If paid by the employee, an itemized receipt and proof of payment must be attached.

Hayward Unified School District
TRAVEL & CONFERENCE PROCEDURES

4. **AIRFARE-** Airfare must be listed on expense sheet, even if paid by the District, and must be evidenced by returning final copy of ticket or computer generated itinerary with confirmation # when traveling “ticketless”. Boarding passes or receivers are not acceptable receipts for airfare. Besides the dates, time, destination, etc. Purchasing will need the birthdate(s) and gender of attendee(s). First class airfare is not reimbursable.
5. **MILEAGE-** Write in total miles from your school site or home (whichever is the shortest distance) to the conference/workshop, only for the days of travel. The Excel form will calculate the amount for you. Submit a printout from MapQuest/ Google map or any other website to document number of miles driven.
6. If HUSD prepaid any expenses (such as conference registration and/or airfare), the total prepaid amount is written in the *Less District Prepaid Expenses* block.
7. The **Maximum Allowed** is the amount that was approved on the pre-authorization form (the Total Estimated Expenses line).

Reimbursement Guidelines

Actual & Necessary Expenses: Employees will be reimbursed only for actual and necessary expenses, including tips & gratuities. All expenses should be based on the most economical way to travel. ***Original*** receipts must be included with the reimbursement claim

Most Economical - All travel expenses shall be based on the most economical way to travel. Only the lowest expense amount shall be reimbursed.

No-Shows: The employee may be responsible for reimbursing the District for all expenses incurred if the employee does not attend the workshop. Therefore, it is incumbent upon the employee to notify their supervisor immediately if they cannot attend and cancel reservations to avoid the costs or find another person who may be able to attend in the employee’s place.

Ground Travel: Travel with personal automobile must have prior approval, and is reimbursed at the district approved rate per mile. If a car rental is approved for the conference, you must provide your itemized receipt from the car rental agency. If reimbursement for gasoline for the rental car is pre-approved, you must provide a receipt from the gasoline station. Parking is reimbursable upon submission of receipts.

Hayward Unified School District
TRAVEL & CONFERENCE PROCEDURES

NOT REIMBURSEABLE (not an all-inclusive list):

- Both mileage **and** car rental/gas charges, while at the conference.
- Per diem for any meals that are included with conference registration (excluding “continental breakfast”)
- Optional conference “special activities” “events: and pre/post conference” “side trips” not directly related to the education of the attendee.
- Lodging for workshops within 50 miles distance of district office or the employees’ home.
- Individual membership fees in organizations sponsoring the conference/workshop
- Expenses for alcoholic beverages