1.0 AUTHORIZATION TO TRAVEL ON SUSD BUSINESS

The Saratoga Union School District (SCUSD) may require or allow SUSD employees to travel for work for the purpose of attending conferences, meetings, workshops, in-service, or conventions presented or conducted by a public or private national, state, or a regional agency and other temporary assignments away from their primary job location.

This Administrative Regulation is designed to address the support system for travel, outline the employee's responsibilities for travel expenses and the reimbursements, and assist the maintenance of accurate records on all SUSD employees' travel.

1.1 Authorization and Responsibility

Staff travel must be authorized in advance. It is the responsibility of the authorized traveler to use sound, prudent, and professional judgment when requesting travel approval. It is also the responsibility of the recommending and approving authority to determine the need, benefit, and appropriate use of employee time and SUSD funds. Designated approval authorities are responsible for the review and approval of expenditures and may deny approval if there is reason to believe that the expenditures are inappropriate or extravagant. Allowable expense reimbursements will consist of actual and necessary expenses incurred by any employee required to attend any activity covered by the definition of this AR.

1.2 Local Travel

Local travel is defined as travel within Santa Clara County or Santa Cruz County that is one day only and does not involve an overnight stay.

SUSD employees are authorized to travel locally, as defined above, when said travel is required and is considered a part of the routine or day-to-day official duties of the employee as defined and authorized by the employee's immediate supervisor.

For local travel in which there are anticipated expenses in addition to mileage, parking, and tolls, the employee must obtain prior authorization by the employee's immediate supervisor for the expense to be reimbursed. Reimbursement for lunches may not be claimed if the employee is traveling within the local travel defined area and the work performed is part of the normal scope of the job assignment.

1.3 Out-of-Area (within California)

Out-of-area travel within California is defined as any travel that does not occur within the locally defined areas as defined in section 1.2. When an employee travels out-of-area within California, he/she must secure approval from his or her immediate supervisor, Department Head, and/or Assistant Superintendent or Chief Business Official. Employees who travel on business that is not local shall request approval at least two weeks in advance of their trip, except in instances when the two-week requirement is not feasible.

1.4 Out-of-State Travel

When an employee travels out of California, he/she must secure approval from his/her immediate supervisor, Department Head, and/or Assistant Superintendent or Chief Business Official.
Employees who travel outside of the State shall request approval at least 30 days in advance of their trip, except in instances when the 30-day requirement is not feasible.

2.0 TRAVEL EXPENSES

2.1 Lodging

An employee on approved travel requiring overnight lodging should consult their immediate supervisor and/or department head. Lodging may not exceed the single occupancy room rate; multiple occupancy room rates will only be allowed if two or more SUSD employees share a room.

2.2 Meal and Incidental Expenses Allowance

Staff traveling on behalf of the SUSD out of the area or out of state will be reimbursed for meals and incidental expenses subject to a maximum daily allowance determined by the General Services Administration (GSA) allowable per diem rate. The GSA allowable rate is location-specific and the information can be found at the GSA website for allowable rates (https://www.gsa.gov/travel/plan-book/per-diem-rates). Incidental expenses include gratuities for meals, housekeeping, portage, etc. Employees are allowed to spend the allowable daily rate on meals and incidental expenses in any legal way as long as it is within the rate for the travel area unless meals have been provided as part of the conference or meeting. Employees must submit copies of conference registration or agendas for meetings to substantiate the per diem rate claimed. Reimbursement for actual expenses incurred during travel that exceed the daily meal and incidental daily rates are not allowed.

If travel includes meals that are already paid for by SUSD (such as a registration fee for a conference that includes meals), the employee must deduct the cost of the meals from the daily meal total by the rates provided on the Meals and Incidental Expenses (M&IE) Breakdown on the GSA website at: https://www.gsa.gov/travel/plan-book/per-diem-rates even if the employee chooses to not take the conference meal.

No allowance shall be made for the purchase of alcoholic beverages. The purchase of alcoholic beverages is prohibited by Education Code section 32435.

Employees will be reimbursed at a rate of 75 percent of the maximum daily allowance for the first and last calendar day of travel. The rate allowable will is available on the GSA website.

No meal and incidental expense reimbursement will be allowed within the defined Local Travel area (see 1.2) unless meals are scheduled as an official part of conventions, conferences, workshops, or meetings, and have been approved prior to the event. When such meals are scheduled, an employee must submit supporting documentation in the form of itemized receipts and conference registration forms and agendas and will be reimbursed for actual expenses only, not to exceed the applicable per diem rate.

Reimbursement will be made upon submission of the approved SUSD Conference/Workshop Request Form located on the SUSD website under FOR STAFF.

3.0 INTERNET AND PHONE ACCESS

When away from the office and the use telephone or the internet is required for business purposes, an employee may purchase internet or phone use, if the SUSD cannot provide the resources for those services in advance.
4.0 TRANSPORTATION

Employees are expected to travel in the most direct and economical manner, and evaluate the cost of alternative options (e.g. ride-sharing, taxis, long-term parking) when selecting the mode of transportation.

4.1 Personal Vehicles

Employees may use their personal automobiles on official business as long as the use of said vehicle is properly insured with at least the minimum required insurance coverage. Under no circumstances will the use of private aircraft or motorcycles be authorized or approved.

4.2 Mileage Reimbursement

The provisions below apply to all employees.

a. Individuals who receive a monthly mileage stipend will not receive any additional reimbursement for travel within Santa Clara County.

b. An employee can be reimbursed for the use of his or her personal automobile when used for official business. Mileage reimbursement shall be at the current IRS mileage rate.

c. All claims for mileage reimbursement shall be submitted on the SUSD Conference/Workshop Request Form. Reimbursements shall be filed within 10 working days following return from travel when possible, but in no case later than the end of the month following the month in which the expenditure is incurred.

d. An employee will be reimbursed for mileage only between points of official business.

e. An employee using his/her automobiles on an extended trip outside the county will be reimbursed in an amount that does not exceed the amount which would have been spent if the employee used coach or economy air transportation or other commercial transportation.

f. Reimbursable mileage when travel originates or ends at the employee's residence is determined by the following formula;

\[
\text{Reimbursable Mileage} = \text{Total Mileage} - \text{Round Trip Home-to-Work Mileage (Regular Commute)}
\]

Per IRS Pub 463, mileage between an employee's home and primary work location is considered commuting expense and not subject to reimbursement. However, in unique situations, special program needs may require that an employee is assigned at different work locations and must commute to one or more separate sites. An employee will only be reimbursed for the accumulated official business mileage between locations. The computation of mileage subject to reimbursement is the total miles traveled during the day minus the daily round-trip from Home to the primary assigned work location.

g. Actual and necessary parking expenses shall be reimbursed if supported by receipts.

4.3 Car-Pooling

The District strongly encourages employees to share transportation whenever it is practicable for employees to travel together on official business. Mileage reimbursements will be made to the employee who uses his/her vehicle.
4.4 Rental Cars

Employees shall use a rental car only when other forms of commercial transportation (e.g., shuttle, taxi, ride-sharing, etc.) are unavailable, too costly, or impractical. Prior approval for the use of rental cars must be obtained in order for the expenses to be reimbursed.

Employees shall sign up for the standard insurance package when entering into the rental agreement unless coverage is automatic through the credit card being used. Itemized rental agreements must be included with the Conference/Workshop Request Form.

4.5 Air Travel

Purchases of airfare must follow the approval guidelines of section 1.3 and 1.4. Employees should consult with their immediate supervisor and/or department head about travel accommodations. Reimbursements for air travel will be processed once travel has been completed.

5.0 TRAVEL COST REIMBURSEMENT AND DOCUMENTATION

Claims for reimbursement for authorized expenses are subject to the following provisions.

5.1 Documentation

All claims for out-of-pocket expenses not subject to the per diem rate for meals and incidentals incurred while traveling shall be itemized on the Conference/Workshop Request Form and accompanied with itemized receipts.

Employees must submit copies of the conference, workshop, in-service, or convention registration forms or agendas for meetings with the Conference/Workshop Request Form to substantiate the dates of the Meals and Incidental expenses per diem rates and any meals included in the registration.

Reimbursement claims shall be prepared on the Conference/Workshop Request Form, and shall only be approved as indicated on the instruction of the Conference/Workshop Request Form.

5.2 Timelines

All claims for reimbursement must be submitted on a monthly basis but in no case later than the end of the month following the month in which the expenditure was incurred. Claims received more than 60 days after travel has occurred may be denied.

6.0 RESTRICTED PROGRAMS

For any Federal and State grants which may have particular and/or more restrictive dollar requirements on travel expense than our policy, SUSD will follow the more restrictive requirements of the funding source.

Regulation SARATOGA UNION SCHOOL DISTRICT approved: November 14, 2019 Saratoga, California