SAN MATEO COUNTY SELPA

SPECIAL EDUCATION LOCAL PLAN AREA

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Travel Policy and Reimbursement Guidelines for Parents/Guardians with students in Residential Placement

The Governing Board of the San Mateo County Special Education Local Plan Area (SELPA) recognizes that students with exceptional needs who have been placed in or referred to Residential Treatment Centers (RTC) or Residential Non-Public Schools (RNPS) by a Local Education Agency (LEA) as a means of providing a Free and Appropriate Public Education (FAPE).

LEA for these guidelines refers to the LEA of Accountability.

Student and Parent/Legal Guardian (as defined by California Education Code) travel during initial placement, student travel for home visits as deemed necessary by the Individualized Education Program (IEP) team and/or RTC/RNPS, and travel related to student discharge are subject to the following guidelines:

General Information

- The LEA shall pay for actual and necessary reasonable expenses, so that a Parent/Guardian of a student placed in RTC/RNPS by an LEA generated IEP can make therapeutically necessary trips to visit the student.
- The IEP team shall determine how many trips are necessary to support the student's IEP.
    - Typically, four therapeutic visits per year (parents or student home visits) is considered best practice.
- The purpose of the visits should be to address therapeutic needs related to the student's IEP.
- The LEA shall only fund expenses for one or both parents/guardians to the RTC or for the student to conduct a home visit, round trip.
- A Travel authorization form must first be sent to the residential facility for approval of a visit by the RTC therapist/case manager and then sent to the LEA for secondary written approval by the designated LEA Administrator, before travel arrangements can be authorized.
- Limits and regulations have been established, and are enumerated below, that allow for reasonable reimbursement of expenses. The list below is not exhaustive, and charges determined to be unreasonable or unnecessary may be denied for reimbursement at the discretion of the LEA Superintendent or Designee.
    - It is suggested that, if a charge or service is not covered below, and there is any doubt as to it being appropriate, parent should discuss the request with the LEA Superintendent or Designee before expending the funds.
- Travel is to be paid for by the family, (unless otherwise arranged in advance) with receipts submitted to the district within 30 days of return. Reimbursement will be made by the district within 60 days and following the conditions listed in this policy.

Participating LEAs: Bayshore Elementary School District, Belmont-Redwood Shores School District, Brisbane School District, Burlingame School District, Cabrillo Unified School District, Connect Community Charter, Design Tech High School, Everest Charter High School, Hillsborough City School District, Jefferson Elementary School District, Jefferson Union High School District, KIPP Esperanza, KIPP Excelencia, KIPP Valiant Community Charter, La Honda-Pescadero Unified School District, Las Lomitas Elementary School District, Menlo Park City School District, Millbrae Elementary School District, Oxford Day Academy, Pacifica School District, Portola Valley Elementary School District, Ravenswood City School District, Redwood City Elementary School District, San Bruno Park School District, San Carlos Charter Learning, San Carlos School District, San Mateo County Office of Education, San Mateo-Foster City School District, San Mateo Union High School District, Sequoia Union High School District, South San Francisco Unified School District, Summit Preparatory Charter High School, Woodside Elementary School District

Pre-Authorization for Parent/Legal Guardian/Family/Student Travel

At least 30 days before a planned visit begins, Parent/Guardian must complete a Travel Authorization Form. Please note that the form must be approved by both LEA and the residential placement. The placement will need to certify to the LEA that the visit is therapeutically necessary and that up to two family members visiting individually need to be part of the trip. Also note that estimates are required for airlines, lodging, and rental cars. If any of these amounts are determined to be more than is customary for any of these items, the LEA or Residence may ask the parent to attempt to find more reasonable arrangements. It is important that trips be booked far enough in advance so that availability and reasonable rates can be assured.

POLICY INFORMATION

Guidelines for Reimbursement:

- **PARENT/GUARDIAN** must submit a Travel Authorization Form 30 days prior to planned departure
- **PARENT/GUARDIAN** is responsible for making travel arrangements.
- **PARENT/GUARDIAN** is responsible for submitting **original,** itemized receipts for Allowable Expenditures.

To obtain reimbursement for pre-approved travel, the parent/legal guardian must submit as follows:

- Submit itemized passenger ticket receipts.
- Itemized, original dated receipts for all reimbursable items.
- Receipts must specify the date and exact cost of the item for which reimbursement is required.
- Organize receipts by date and **submit no later than thirty (30) days after the last day of travel**.

All travel, when submitted as outlined above will be reimbursed **within sixty (60) days of complete submission.**

Allowable Expenditures for Reimbursement

Allowable expenses shall be limited to two (2) parents or guardians per visit.

- **Airfare**:
    - Coach/Economy class only
    - Parent/legal guardian shall book only the least expensive tickets, 30-day advance purchase required, and fly in the most direct and economical route possible for the location being visited.
    - LEA will not allow auto or other ground transportation in lieu of flying if it is determined that this would increase the costs significantly (please refer to the Automobile Mileage section below for additional information).
    - Airfare will be reimbursed at an amount **not to exceed $400.00** per person per visit.
        - If airfare is expected to exceed this amount, an exception needs to be requested in advance.

- Lodging:
    - Parent/legal guardian will be given a maximum reimbursement, **per trip, up to $350.00.**
    - A total of two nights lodging will be reimbursed, per trip.
        - If lodging is expected to exceed this amount, an exception needs to be requested in advance.
- Meals
    - Reimbursed at the IRS meal allowance
    - Gratuity not to exceed 20% on pre-tax cost of food

- Car Rental:
    - Compact/Economy car rental to and from the airport/bus terminal/train terminal, related to Parent/Legal Guardian travel to the RTC or RNPS.
    - Fuel will be reimbursed for actual mileage travel to/from airport/bus terminal/train terminal, lodging, and RTC or RNPS.
    - Parent/Legal Guardian will be given a maximum reimbursement for the rental car of **$50.00 per day**, for up to two days.

- Shared rides (i.e., Uber, Lyft, etc.):
    - Expenses related to shared rides to and from the airport/bus terminal/train terminal, related to Parent/Legal Guardian travel to the RTC or RNPS not to exceed $30 one-way.
    - Carpool/Economy rides only.

- Automobile Mileage/Personal Vehicle Use:
    - Parent/legal guardian will be reimbursed at the IRS approved rate (updated annually on January 1st).
    - Total miles will be calculated from Parent/Legal Guardian's home address directly to the RTC or RNPS as determined by the shortest round-trip route with verification provided by a route application such as Google Maps or Mapquest.
    - The total reimbursement amount for mileage traveled may not exceed the cost of economy airfare to the RTC.
        - Example, if the roundtrip airfare, plus airport parking and ground transportation to the RTC is $350.00 and the mileage reimbursement totals $600.00, the mileage reimbursement would be reduced to $350.00.

Non-Allowable Expenditures for Reimbursement

- Expenses which exceed regular/customary fees such as:
    - Luxury hotel/accommodations
    - Travel insurance
    - Upgraded airfare or flight experience such as: Economy plus/Extended Leg Room seats, first class/business class tickets, in-flight Wi-Fi or movies.
    - In hotel room expenses such as: in-room movies, room services
    - Mid-size, intermediate, or luxury class car rentals
    - Shared rides at a level beyond the most economical (e.g., Uber X, Uber Comfort, Lyft XL, etc.)
    - Alcohol, Tobacco, Marijuana/THC or related products
    - Entertainment related expenses (i.e., amusement park, sporting events, movies, etc.)
    - Car rental fees such as: insurance coverage, damage waiver, navigation system or other add-on systems, or pre-paid fuel.

- Expenses related to itinerary changes or cancellation fees.
- Cost of checked baggage or excess baggage fees.
- Visitation to RTC or RNPS **prior** to placement.
- Travel expenses for siblings, extended family, friends, or advocates.
- If complimentary breakfast is provided with lodging costs, reimbursement for breakfast will not be provided.
- Expenses made against educational recommendation (such as Parent/Guardian removal from RTC or RNPS for any reason against the RTC or educational recommendation, or for a duration that has not been approved in it's entirely).
- Ground transportation is not reimbursable if the RTC/RNPS provides transportation to and from the airport to their facility.
- Fees for pet care.
- Any expenses paid by the RTC are not reimbursable, such as airfare, transportation, meals and/or accommodations.

Note: Altered or falsified receipts constitute fraud, and, therefore, all requests for trip expense reimbursements will be made null and void.

TRAVEL REIMBURSEMENT CLAIM FORM

This form is to be completed by the Parent/Legal Guardian and submitted to the LEA within 30 days of the last day of travel.

Travel Details

Person Submitting Claim:	
Name of Student:	
Mailing Address:	
Person(s) traveling:	
First date of travel:	
Last date of travel:	

Expenditure	Day 1	Day 2	Day 3	Total Cost:
Airfare	$	$	$	$
Hotel	$	$	$	$
Car Rental	$	$	$	$
Ride-Share / Parking	$	$	$	$
Meals	$	$	$	$
Other	$	$	$	$

TOTAL REIMBURSEMENT REQUESTED $_____

SUBMISSION INSTRUCTIONS:

Return this completed form, with all original, itemized receipts to LEA Representative.

Form must be submitted within 30 days of the final date of travel, or claim will not be processed by the LEA, in accordance with SELPA guidelines.

Please retain a copy of all receipts for your records.

TRAVEL AUTHORIZATION REQUEST FORM

*This form is to be completed at least **30-days** prior to the requested travel.*

Part 1: To be completed by the Parent/Guardian

Family Information

Person Submitting Request:	
Name of Student:	
Name of Placement:	
Person(s) traveling + relationship to student:	

Requested Travel Arrangements

First Date of Travel:	
Last Date of Travel:	
Requested Airline and Estimated roundtrip Airfare:	
Requested Hotel and Estimated nightly rate:	
Requested Rental Car and Estimated daily rate:	

Part 2: To be completed by the Residential Case Manager / Facility Director

Visit Information

Person recommending visit:	
Purpose of Visit:	
Brief description of therapeutic activities during visit:	

Part 3: To be completed by the LEA Administrator / Designee

District Approval

Person completed Travel Authorization review	
Visit Approved? (yes/no + date of decision)	
Conditions of approval?	
Any extraordinary costs associated with the request?	