

SMJUHSD Fiscal Services Travel & Conference FAQ

I am going to a Conference. What are the first steps I should take?

Read the following documents from the district's website under the Business Services Travel & Conference section:

- Board Policy 3350 Travel Expenses – <https://www.smjuhsd.org/fs/resource-manager/view/0a58b3e8-f3fd-4cf6-9f71-87a8b702d64b>
- Administrative Regulation Travel Expenses (AR3350) - <https://www.smjuhsd.org/fs/resource-manager/view/a240993e-6184-412e-b41b-9250c75f44ce>
- Travel and Conference Procedures – This form will provide you with guidance you need to complete the Travel & Conference Form - <https://www.smjuhsd.org/fs/resource-manager/view/8050ad69-e28f-4e43-9f4a-79a10c52a371>
- Meal and Mileage Reimbursement Rate- <https://www.smjuhsd.org/fs/resource-manager/view/9b204998-f845-4a63-83c6-31aa762078f6>

Print and complete the necessary forms related to your reimbursement type:

- Travel and Conference Form - <https://www.smjuhsd.org/fs/resource-manager/view/3f5d37b5-df38-467a-94a1-966df231c86b>
- Mileage Reimbursement Claim Form - <https://www.smjuhsd.org/fs/resource-manager/view/817a264a-322b-4b64-8fda-1ddfb88d9839>

What does it mean when you mark the “Prepay” box on the Travel and Conference Form?

Checking this box authorizes the District Office to issue payment for hotel charges, registration fees, or both. If the box is not checked, you will pay upfront and request reimbursement after travel is completed.

How far in advance should prepayment requests be submitted?

Hotels generally require payment at least two weeks before check-in. To meet this timeline, submit your Travel and Conference packet approximately one month prior to your stay.

I prefer not to pay for my travel costs upfront. What documentation is required for prepayments?

Completed and pre-approved Travel & Conference Form with appropriate funding source listed, along with the event flyer and or conference agenda.

Registration: You'll need to register yourself. Submit proof of registration confirmation showing payment details (for registration prepay always select the purchase order option, if available)

Hotel: Book your hotel reservation. Submit hotel booking confirmation in your travel & conference packet.

Submit all documents as early as possible but must be received by the business office **at least one month prior to the earliest deadline** to allow for processing and receipt of payment by vendors.

What if the registration system requires a Purchase Order (PO)?

Email a scanned copy of your approved Travel & Conference Form cover page, the registration page, and conference details to the Fiscal Technician. A PO will be issued so you can complete your registration.

Can I choose whether to drive or fly?

Travel should be based on the lowest overall cost for the district. Compare the round-trip mileage cost to the round-trip airfare and anticipated baggage fees if any. If the round-trip flight cost is less than the cost of the mileage, then the flight is considered a reasonable expense. Include this cost comparison with your T&C Forms when requesting pre-approval. Airfare reimbursement is limited to economy fares; upgrades, seat assignments, trip insurance and other addons are not reimbursable.

What do I need to do besides submitting the form including all relevant backup documentation and obtaining approvals?

Each traveler is responsible for their own conference registration and hotel reservations after their conference has been pre-approved. It is highly recommended that you avoid third party websites (Expedia, Booking.com, Priceline, etc.) and book only with the hotel directly as additional fees incurred when booking with a third-party vendor are not reimbursable.

Can I be reimbursed for accommodation the night before the conference?

Yes, if the conference is more than 150 miles from your worksite or requires over a three hour -one-way- drive. Otherwise, you may stay the night before, but it will not be reimbursed.

Can I take a longer mileage route to qualify for a hotel the night before a conference?

No, trip mileage should be calculated based on the least mileage route unless there is a documented road closure.

Is lodging after the conference reimbursable?

Yes, if the conference ends after 5:00 p.m. *and* is more than 150 miles from your worksite. If it does not meet both criteria, you may stay overnight at your own expense.

My conference agenda ends at 4:30 pm is the lodging after the conference reimbursable?

No, per the policy it would have to end after 5:00 p.m and be more than 150 miles from your worksite.

Can my co-worker pay for my hotel?

No, each traveler should pay and then request reimbursement. Payments will only be made to the individual who made the payment.

Can I get reimbursed if I checked in early to the hotel and was charged an early check-in fee?

No, early check-in fees are not reimbursable without a documented business purpose.

My hotel doesn't have a restaurant nearby; can I claim mileage to and from the restaurant?

No, this is considered a personal expense and is not reimbursable.

When can I book out-of-state- travel?

Out of- state travel requires Board approval. Once your trip is approved by the Board, you may proceed with booking your flights, hotel, and registration. Do not book flights, hotels, or registration until approval is granted if the trip is not approved, and you have made nonrefundable reservations the district will not reimburse you.

The Board approved my out of state travel and the conference dates changed by more than 1 day, do the new dates require a new board approval?

Yes, the revised dates will have to be presented to the Board for approval.

My flight was cancelled and the airline re-booked me on a later more inconvenient flight time, can I cancel that flight and book an alternate flight on a different airline and get reimbursed for the additional cost of the new flight?

No, if you choose to change your flight and incur additional charges, you will be personally responsible for the additional cost of booking that flight. When traveling, there is no guarantee that you will not be inconvenienced in the event of airline delays or cancellations.

Are meals reimbursable?

Meal reimbursements follow IRS Per Diem rates. Travel days do not qualify for a full day of meals per diem. Meals included with conference registration are not eligible for reimbursement. Travel times must fall within these windows to qualify:

- **Breakfast:** Travel begins before 7 a.m. and ends after 9 a.m.
- **Lunch:** Travel begins before 11 a.m. and ends after 2 p.m.
- **Dinner:** Travel begins before 4 p.m. and ends after 7 p.m.

What do I do after completing my trip?

Complete the "Reimbursement Itemized Expenditures" section of your Travel and Conference Form, including all travel-related costs (lodging, meals, registration, mileage, rental vehicles, flights, baggage fees, parking, etc.), and enter the total expense amount.

Attach all original itemized receipts showing payment method and totals.

Additional requirements:

- Hotel stays require a \$0 -balance itemized folio.
- Mileage claims must include a mileage printout using your worksite as the start and end point.
- Meal receipts are not required.
- Sign the "Claimant's Signature" section and obtain necessary approvals before submitting for reimbursement.