PERRIS UNION HIGH SCHOOL DISTRICT

TRAVEL AND CONFERENCE MANUAL

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General

The purpose of this document is to provide all stakeholders of the Perris Union High School District a clear understanding of the district's policies and procedures as it relates to travel and conferences and to establish effective control over travel and conference expenses.

District employees–represent–Perris Union High School District while traveling and are expected to present themselves in a professional manner at all times. If at any time during travel, an employee's behavior is deemed to be inappropriate, as determined by current Board Policy 4119.21, "Professional Standards," the employee may be reprimanded and may lose all future travel privileges.

Failure to comply with Board Policy 3350, "Travel Expenses," including failure to obtain authorization of travel prior to the travel date, no reimbursement of expenses will be permitted.

Travel Authorization

The following process must be followed whenever a district employee is planning to attend a conference, workshop, or meeting:

1. **Preliminary Supervisor Approval**
   Individuals planning to attend a conference or workshop must communicate with their immediate supervisor to discuss the purpose for attending and obtain preliminary approval. Attendance at conferences or workshops must relate to the attendee's duties, responsibilities, and job performance.
2. **Administrative Review and Cabinet Approval**
   The site or department administrator is responsible for completing the PUHSD Conference & Travel Submission Process. All conference and travel requests require review and approval by the Superintendent's Cabinet prior to proceeding. Once Cabinet has reviewed the request, the administrator will be notified of the approval status.
3. **Conference/Workshop Request Form Submission**
   A "Conference/Workshop Request Form" must be completed by each individual who is planning to attend the event. The form must be approved by the employee's immediate supervisor and submitted in accordance with the timelines outlined below. **NOTE:** Requests requiring air travel should be submitted at the earliest possible time to maximize the ability to achieve the most advantageous airfare rates.

	Minimum Timeframe Prior to Registration Deadline
Travel is Out of State	Twelve (12) weeks
Travel funded by Categorical Funding and involves registration fees, transportation, and/or overnight lodging	Six (6) weeks
All other Travel	Four (4) weeks

4. **Final Approval, Travel Arrangements, and Reimbursement**

   The approval process shall include the traveler's supervisor, the program administrator who oversees the grant or budget resource (if applicable), as well as the appropriate member of the Superintendent's Cabinet for final approval prior to being submitted to Accounting for processing.

   Once all approvals are obtained,the requestor will be notified via Informed K12, at which time travel arrangements can be made by the requestor, school site, or department, as appropriate.

   Upon completion of travel, the traveler shall submit a completed "Conference/Workshop Expense Claim Form" along with any required receipts (parking, tolls, etc.) to the Accounting Office for processing via informed K12. All travel expense reimbursement claims shall be submitted on district-designated forms, with required receipts and documentation, within 15 calendar days following return from travel. Claims submitted more than 60 calendar days after the date of return shall not be reimbursed.

Travel Arrangements and Allowable Expenses

Mode of Travel

Air Transportation Following required approvals, air travel arrangements shall be made by the office of origination using the most economical and advantageous providers available. The total cost of air transportation, including airfare and standard baggage fees, shall be included on the Conference/Workshop Request Form to reflect the full cost of the trip, even when airfare is charged directly to the district through a travel agency.

Standard airline baggage fees will be reimbursed, when supported by appropriate documentation. Fees related to overweight baggage limits are not reimbursable. Employees are encouraged to limit luggage to carry-on items when feasible.

"No-show" fees, missed flight charges, and costs associated with last-minute cancellations may not be reimbursed. The district will not pay or reimburse for airline upgrades, including but not limited to preferred seating, seat assignments, or early check-in options. Unless seat assignment is required by the airline and is not considered an upgrade.

District-Owned Vehicles Only district employees are permitted to operate district-owned vehicles. Employees must be cleared through Business Services prior to operating a district vehicle. Clearance includes verification of a valid California driver's license, completion of the Department of Motor Vehicles (DMV) driver history review and approval process, and completion of all required online training.

Passengers may be transported in a district vehicle only when their presence is required for official district business. Employees who are not eligible for coverage under the district's insurance policy will not be permitted to operate a district vehicle.

All accidents involving district-owned vehicles must be reported to the Deputy Superintendent of Business Services within twenty-four (24) hours.

Employees using district-owned vehicles are not eligible for mileage reimbursement. However, reasonable and necessary incidental expenses related to the use of a district-owned vehicle (e.g., tolls or parking) may be submitted for reimbursement.

Private-Owned Vehicle The district permits employees to use privately owned vehicles for official district business. When two or more employees are traveling from the same area to the same destination, carpooling with a minimum of two employees per vehicle is strongly encouraged to reduce costs. The economical use of district funds shall take precedence over personal convenience or preference.

Mileage reimbursement shall be paid only to the employee who owns the vehicle used for transportation. Mileage shall be calculated from the employee's work location to the destination and return, or from an alternate location such as the employee's residence, whichever results in the most economical cost to the district. Only miles traveled in the course of official business are eligible for reimbursement, when supported by appropriate documentation.

Mileage reimbursement shall be paid at the current Internal Revenue Service (IRS) standard mileage rate in effect at the time of travel. In addition to mileage, reimbursement may be claimed for necessary related expenses such as ferry fares, bridge tolls, and parking fees, when supported by appropriate documentation.

When an employee elects to drive to a long-distance conference for which air travel would be more practical, mileage reimbursement shall be limited to the equivalent cost of coach airfare plus the cost of airport parking. When multiple employees attend the same conference, airport parking shall not be included in this calculation, as carpooling would be an available option. Parking costs incurred at the conference site or hotel will not be reimbursed.

In the event of an accident while using a privately owned vehicle for district business, the employee's personal automobile insurance shall serve as the primary coverage.

Other Ground Transportation (Shuttles, Taxis, and Parking) Ground transportation expenses, including shuttle services, taxis and ride-share services, may be reimbursed for travel between the airport and hotel and between the hotel and conference location when supported by appropriate documentation. Such expenses require prior approval through the Conference/Workshop Request Form. Approval from the Assistant Superintendent of Business Services or designee is required prior to the travel dates in order for rental vehicle use to be reimbursed.

Transportation costs for unofficial or personal travel are not reimbursable. Transportation related to dining will not be reimbursed unless no dining options are available within reasonable walking distance or extenuating circumstances exist.

Parking expenses at hotels or conference locations will be reimbursed at the self-parking rate only when supported by appropriate documentation. Valet parking will not be reimbursed unless self-parking is unavailable. Airport parking must be limited to the least expensive on-site parking option.

Registration Fees

The actual cost of conference or workshop registration fees will be paid by the district upon final approval. Payment must be supported by appropriate documentation, such as a conference flyer or registration confirmation, which shall be attached to the Conference/Workshop Request Form.

Employees are expected to make every reasonable effort to take advantage of early registration discounts when available. It is recognized that early registration may not always be possible due to limited notice provided by conference sponsors.

When available, employees are encouraged to select “Purchase Order” or “Check” as the payment option during the registration process in order to secure a registration spot pending district payment. Proof of registration, such as a registration confirmation page, must be submitted with the required paperwork to facilitate timely district payment.

Meals and Incidentals

Meal costs shall be reimbursed at a per diem rate for official district business, unless meals are provided by the conference or event. When meals are provided as part of the event, no reimbursement shall be made for those meals. If an employee elects to purchase a meal that is otherwise provided, the cost will not be reimbursed.

Receipts are not required for meals reimbursed at the per diem rate. Employees who require receipts for personal tax purposes are responsible for retaining their own meal documentation.

The daily meal per diem and incidental allowance shall not exceed eighty-six dollars ($86.00) a day. Meal eligibility is as follows:

Meal Type	Reimbursement Amount	Eligibility Criteria
Breakfast	$22.00	Travel must begin prior to 7:00 a.m. to reach the meeting site
Lunch	$23.00	Meeting end time and travel distance do not allow return to the district or home prior to 1:00 p.m.
Dinner	$36.00	Meeting end time and travel distance do not allow return to the district or home prior to 7:00 p.m.
Incidental Expenses	$5.00	Incidental expenses are minor, necessary costs incurred while traveling on official district business.

If travel occurs in a city or locality with a published per diem rate higher than the District's standard rate, as established by the U.S. General Services Administration (GSA), the higher rate may be claimed. To be eligible for reimbursement at the higher rate, a copy of the applicable GSA per diem rate for the travel location and dates must be attached to the travel expense claim. The employee must enter the meal amounts using the higher authorized rate on the expense claim form.

Any expenses incurred in excess of the established per diem limits shall be the responsibility of the traveler.

When one or more meals are provided as part of a district-paid conference or event, the maximum daily per diem allowance shall be reduced by the applicable meal amount(s) listed above.

The district reserves the right to deny reimbursement for any expenses that are not in alignment with applicable Board Policy or this administrative manual.

Lodging

Employees should make every reasonable effort to schedule meetings and conferences in a manner that avoids the need for overnight accommodations whenever possible. Lodging expenses shall not exceed the rate charged by the host hotel for a scheduled event or conference, or the single-occupancy rate of a reasonably priced hotel located within the vicinity of the event. If an employee elects to stay at a hotel determined to be excessive in cost, the employee may be responsible for any amount exceeding the reasonable single-occupancy rate. Employees are encouraged to request the government rate when making hotel reservations, when available.

Hotel accommodations may be authorized for the night prior to a conference when the employee is required to depart from the assigned worksite or residence, whichever is closer, before 6:00 a.m. in order to arrive at the conference on time. An employee may remain overnight following the conclusion of a conference when the conference ends after 6:00 p.m. and travel time would not allow the employee to return to the assigned worksite or residence, whichever is closer, before 10:00 p.m. When an employee remains overnight after the conclusion of a conference, return travel must begin no later than 7:00 a.m. the following morning. The employee must return to work that day or request the appropriate leave. Exceptions to these lodging requirements must be approved in advance by the Deputy Superintendent of Business Services or designee.

Personal expenses shall not be paid or reimbursed by the district. If personal charges are included on a hotel bill paid using a district credit card, such expenses will be deducted from the employee's reimbursement or from a subsequent payroll warrant. Personal expenses include, but are not limited to, room service, laundry or dry-cleaning services, pay-per-view movies, and other personal hotel amenities.

Hotel reservations may be held using a personal credit card and, upon final approval of the conference or workshop, paid in advance by a district check. This payment method must be indicated on the Conference/Workshop Request Form. If a conference or workshop is not approved, the employee is responsible for

canceling the reservation within the hotel's published cancellation timeframe to avoid charges.

Travel Expense Reimbursement

Travel expense reimbursement requests must be submitted as soon as practicable following the completion of travel and no later than fifteen (15) calendar days from the date of return. Reimbursement requests submitted more than sixty (60) calendar days after the date of return will not be reimbursed. All reimbursable expenses must be reported on the Conference/Workshop Expense Claim Form via informed K12.

Only expenses that were properly pre-approved and incurred in the course of official district business are eligible for reimbursement. Any expenses incurred in excess of, or not included in, the original approved request are subject to additional review and approval and are not guaranteed to be reimbursed.

Only actual, reasonable, and necessary travel expenses will be reimbursed. All expenses must be properly itemized and supported by appropriate documentation. Personal expenses shall not be reimbursed. If personal expenses are included on a hotel bill paid by the district, such costs will be deducted from the employee's reimbursement or from a subsequent payroll warrant.

The following items are not reimbursable under any circumstances:

a. Personal Expenses
b. Alcoholic Beverages
c. Entertainment
d. Luxury Travel
e. Room Service Expenses
f. Expenses incurred by family members or other non-employees
g. Valet Parking (when other options are available)
h. Any type of shipping/receiving services
i. Computer rental fees
j. Wi-Fi access
k. Any type of upgrade such as a hotel room or airfare/seat accommodation
l. Transportation to/from dining locations when there are food choices within walking distance to the hotel or conference

Itemized receipts are required for all reimbursable travel expenses, except for meals and incidental expenses, which are reimbursed at a flat per diem rate. When a receipt is lost or destroyed, an Affidavit of Lost or Destroyed Receipt must be submitted with the expense claim. This affidavit may be used only in rare circumstances and is not intended to replace the routine submission of receipts. Repeated use of affidavits may result in denial of reimbursement for the associated expense(s).

The Deputy Superintendent of Business Services or designee shall make the final determination on all questions related to travel expense reimbursement claims not otherwise addressed in this manual or applicable Board Policy.

Conference Paperwork Checklist

The following steps should be taken to ensure district paperwork and conference approval is received in a timely manner:

Conference/Workshop Request Form

- ☐ Obtain Approval from immediate supervisor
- ☐ Supervisor to fill out Cabinet Conference/Workshop Pre-Approval Form
- ☐ Received approval from Cabinet Conference/Workshop Per-Approval Form
- ☐ Fill out a PUHSD: Conference/Workshop Request Form
    - ☐ Attach registration materials (e.g., brochure, flyer, or online registration confirmation) that include the event description, location, dates and times, and indicate whether meals are provided. Indicate on the request form whether registration fees will be paid by district credit card, purchase order, or check, if applicable. *Do not register prior to approval* unless a cancellation policy exists; otherwise, the employee will be responsible for any fees incurred.
        - ☐ Driving (if applicable) - Include the estimated mileage on the request form.
        - ☐ Flying (if applicable) - Attach a copy of a proposed flight itinerary and cost. Also, include estimated mileage to and from the airport as well as airport parking. Following approval, the Conference/Workshop Request & Approval form will be returned to the originator, and airfare can be booked. Airfare can be booked with a school site or district credit card or by the employee for reimbursement.
        - ☐ Other expenses (if applicable) - Include estimates for other transportation such as shuttle, taxi, or ride-share service.
        - ☐ Lodging - Attach a copy of the estimated cost for your lodging reservation
- ☐ Submit the "Conference/Workshop Request Form" online and select your school site/department Account Clerk or appropriate Secretary as the next approver.
- ☐ Upon final approval, the initiator will be notified via Informed K12. A copy of the finalized Conference/Workshop Request Form is required when submitting travel reimbursement.

Travel Reimbursement Request

- ☐ Fill out a Conference/Workshop Expense Claim Form no later than 15 calendar days after attending a conference, meeting, workshop, etc. The online form can be found on our District Website.
- ☐ Include a copy of the approved Conference/Workshop Request Form.
- ☐ Attach all itemized receipts (receipts not required for meals) and google map for actual mileage reimbursement.
- ☐ Submit your completed form and receipts and select your school site/department Account Clerk or appropriate Secretary as the next approver, who will then submit to Accounting for processing.

  Note: Administrator approval is not required for reimbursements since all approvals were obtained in advance. *After submission through the online process, you will have the ability to save a PDF copy of your paperwork for your records (if applicable).*