## Travel and Conference

### TRAVEL AND CONFERENCE

- \* Revised Board Policy in February 2012
- \* Significant changes to mention
  - \* Itemized receipts are required for ALL reimbursable expenses
  - \* Meal/beverage limits
    - \* Breakfast \$15
    - \* Lunch \$20
    - \* Dinner \$35



### Procedures - Travel & Conf

- \* Need to complete Travel Approval Request Form, obtain approval (signature) from an administrator overseeing the employee.
- \* If travel outside of California is required, the Travel Approval Request Form must be submitted 3-4 weeks prior, as Board Approval is required.
- \* Please forward the completed Travel Approval Request Form to Human Resources. Please attach event information such as brochure or flyer.
- \* Once approved by the Assistant Superintendent of Human Resources, paperwork will be forwarded to Fiscal.

### Procedures - Travel & Conf

#### \* **DO'S**

- Complete Travel Approval Request Form
- Get Appropriate Approvals
- Keep All Original Itemized Receipts
- Submit Travel Expense Claim Immediately Upon Return

#### \* DON'TS

- Alcoholic Beverages
- Room Service
- Movie Rentals
- Valet Parking
- Other upgrades/fees
- Unauthorized Attendees
- Family Members



### Procedures - Expense Claims

- \* Travel Expense Claim Forms are used to reimburse for pre-approved travel & conference expenses and mileage.
  - \* Do not create a purchase requisition for reimbursements.
- \* Submit the Travel Expense Claim Form to Fiscal Services, after being approved by administrator supervising employee.
  - \* Include itemized receipts. (Individual receipts per person, DO NOT combine receipts)
- \* Mileage Reimbursement:
  - \* If travel is on a work day, subtract out the normal home to work mileage.
  - \* Include a map showing the beginning and ending destinations.
  - \* If mileage is already included in the traveler's contract and the event was within Orange County, mileage cannot be requested.
- \* Submit travel & conference reimbursements immediately after travel is complete.

  Reimbursements submitted after 60 days from the end of a conference may be denied.

### Travel Approval Request Form

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### Travel Expense Claim Form

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