



**Perris Elementary School District
TRAVEL REQUESTS AND REIMBURSEMENT
(Conferences, Travel, and Other Employment-Related Activities)**

Note: Throughout these procedures, frequent reference is made to conferences. However, the procedures relate to all types of travel including conferences, workshops, trainings, symposiums, lectures, academies, and recruiting trips.

In most circumstances, Overnight travel accommodations are paid for by the District on behalf of the employee. As such, the following approval/reimbursement procedures are required for employees who wish to seek reimbursement for travel expenses:

I. APPROVAL /REIMBURSEMENT PROCEDURES

- Step 1. A Travel Request Form must be completed online and processed for each employee attending a conference. Please submit the online request 30 days prior to a conference, and/or if out of state, 30 days prior to the next available board meeting. The request must be submitted online PRIOR to the conference and include all costs (including mileage). Online only, do not send scanned/mailed/faxed copies, etc.
- Submit a requisition(s) with the travel information into Galaxy for processing as soon as possible.
- Step 2. Attach documentation (registration brochure/flyer, lodging/hotel rates, airfare, shortest distance/mileage using MapQuest/Google Maps from work site to destination, etc.) to the online form supporting the conference dates, times, fees, location, and other pertinent information.
- Step 3. Submit the online form for proper approvals.
- Step 4. During the conference, the attendee should retain **legible original itemized** receipts for all expenditures:
- Shuttle Service/ Taxi/Uber/Lyft Services (to/from conference/airport only)
 - Airport/Train Station Parking
 - Hotel/Motel/Conference Itineraries & Agenda's showing meal(s) provided.
 - Self-Parking (unless no other option)
- Step 5. Upon return from the conference, the attendee must complete and sign the Expense Claim Form online to obtain reimbursement for eligible expenditures. Each attendee must complete a separate form and attach **legible original itemized** receipts and other documentation for itemized travel expenses.
- Step 6. Submit the online form for proper approvals.

II. PAYMENT/REIMBURSEMENT

A. Conference Registration

1. The registration is the responsibility of the site/department. The registration check will then be mailed directly to the vendor by Business Services when an online Travel Request Form is submitted and approved with necessary backup documentation.

B. Lodging

1. Hotel/lodging accommodations will be reserved by the site/department Secretary by contacting Business Services for the District credit card information via Google Doc. Business Services will process the payment and send directly to the vendor after a requisition has been processed with all applicable taxes/ costs. **In circumstances where the Hotel/lodging will not accept a district check, Purchase Order or District credit card for payment, the employee will be responsible for paying hotel/lodging fees. Upon returning, the employee can submit an expense claim reimbursement for the cost of hotel/lodging and must include the hotel receipt. Employees are NOT to make their own hotel/lodging reservations. Hotel/Lodging reservations shall be made directly with the hotel and never with third party sites.**

Once the District reserves/pays the lodging for the employee and there becomes a personal need to change the reservation in any way (i.e. room upgrade), the expense charged by the hotel will need to be paid for by the employee. The employee will need to contact the hotel directly. This additional expense will NOT be reimbursed.

If requested, personal credit cards must be used as a hold for incidentals upon hotel check-in.

2. Upon return, employees must submit the original detailed hotel/lodging itinerary and itemized receipts. Please attach to the online Expense Claim Form.

C. Transportation (Class of travel is coach only and does not include insurance, extra baggage fee or Early Bird Check-In)

1. Airline reservations will be purchased by the site/department by contacting Business Services for the District credit card information via Google Doc. An authorized Travel Request Form must be submitted. Employees must indicate preferences on the Travel Request Form, such as dates and times. **Employees are NOT to make their own airline reservations.** The District's main airline is **Southwest Airlines.** Please use "Wanna Get Away" fares whenever available.
2. Once the airfare is booked for the employee and there becomes a personal need to change the flight itinerary in any way (i.e. return on an earlier/later flight, extended stay), the expense charged by the airlines will need to be paid for by the employee. The employee will need to contact the airline directly. This additional expense will **NOT** be reimbursed.
3. Private auto mileage will be reimbursed at the current IRS approved rate per mile along with proof of auto insurance (BP/AR 3550). If the employee

chooses to drive instead of flying to the conference destination, the reimbursement will be the lesser of the mileage/airfare.

4. Shuttle/taxi/Uber/Lyft service will be reimbursed upon return with submission of original receipts attached to the online Expense Claim Form. Transportation to/from the Airport/Hotel/Conference are the only reimbursable expenses. Please be mindful and take the cheaper service when available, and share rides with other employees whenever possible.
5. Rental Car expenses will not be reimbursed unless PRE-APPROVED by the Business Department. Mileage to/from the Airport/Hotel/Conference will be reimbursed at the IRS approved rate per mile.
6. Parking for oversized vehicles will be reimbursed at the standard Self-Parking rate unless no other option is available (i.e. Valet).

D. Meal/Miscellaneous Expense

1. In accordance with IRS regulations (IRS pub. 463), the district utilizes a "standard meal allowance" method for daily meals and incidental expenses. As such, in order to qualify for the standard meal allowance, employees must be traveling away from their tax home overnight on school district business. In such instances, employees will be reimbursed for meals not included in the conference at the following amounts upon return from traveling:

Breakfast	\$17
Lunch	\$18
Dinner	\$34
Incidentals	<u>\$5</u>
	\$74

- a. Single day conferences (with no overnight stay) do not qualify for meal reimbursement in accordance with IRS regulations.
 - b. During first and last day of travel, maximum amount paid is **\$55.50**, per the U.S. General Services Administration
 - c. For meals already provided by the conference, the maximum per diem amount will be reduced by the meal guideline amount as delineated above.
 - d. The district retains the right to deny any reimbursement that is not in alignment with Board policies and regulations.
2. Reasonable charges for baggage handling at airports, depots and hotels will be allowed, but must be itemized by place, date and time.
3. Airport parking is reimbursable but cannot be at the most expensive rates. Receipts are required.
4. No personal expenses will be paid, including personal telephone calls, internet, room service charges, bellman, etc.
5. All reimbursements will be paid after the employee returns from the conference or travel. The online Expense Claim Form must be submitted immediately after travel is complete. **(Claims submitted later than 60**

days may not be honored). Please allow 30 days to process a payment once received in the Business office.

6. No advances prior to the trip will be made.