

## TRAVEL & CONFERENCE SOP

### Don't Trip While Traveling

#### District Policy Statement:

Employees (faculty and staff) traveling on District Business are expected to choose the least costly method of transportation and lodging that meets the traveler's scheduling and business needs. Employees are responsible to ensure that travel expenses are valid District business-related, in accordance with District policies and procedures and are a prudent use of public and District funds. All travel expenses incurred by employees must be substantiated and documented in accordance with District policy and applicable federal and state laws.

District requires all employees to obtain permission in writing to travel before expenses are incurred.

When personal and business travel are combined, expenses must be kept separately and may not exceed the lowest available cost of a direct or uninterrupted route. If the traveler uses an indirect route or interrupts travel for personal convenience, any additional expenses incurred are the sole responsibility of the traveler. Expenses incurred by a spouse or personal guest are not reimbursable expenses and should not be included in the employee's reimbursement expenses.

#### Reason for Policy:

The District policy BP 3550 and AR 3550 has been established to provide standards that govern safe and economical District travel while maintaining the necessary controls, accountability, and compliance with applicable federal and state laws and administrative efficiency.

#### MUSD Travel Procedures:

Only allowable business-related travel expenses will be reimbursed up to limits defined in MUSD Board Policy 3550. Staff seeking reimbursement for travel expenses must have completed and received approval on a Travel Request and Reimbursement Claim Form (prior to travel) and must process the Reimbursement Request for Actual Expenses (bottom section) when the trip is complete. Always include a copy of the conference flier with your reimbursements. **School Sites and Departments are not allowed to establish policies that differ from District wide policy.**

All travel must be approved by your immediate supervisor. Out-of-state travel must be approved by the MUSD Governing Board.

#### Registration:

- A Travel Request and Reimbursement Claim Form must be completed and approved by the appropriate supervisor.
- Conference registration forms, brochures including the conference description, and any other pertinent information must be included with the Travel Request and Reimbursement Claim Form.
- Once the conference is approved, a purchase requisition must be entered into our financial system ESCAPE.

### Hotel:

- If possible enter the purchase requisition into ESCAPE six weeks in advance to receive a check to present at the hotel. If payment by check is not an option then a Cal-Card or personal credit card must be used to cover hotel expenses.

Note on your ESCAPE requisition pertinent information such as: date payment is needed, registration confirmation number, and check-in and check-out date.

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Include the approved Travel Request and Reimbursement Claim Form with the Cal-Card statement.

### Transportation:

- When several employees are traveling to the same conference, the district expects employees to carpool. Employees who choose to drive separately in their own personal vehicle will not be reimbursed for mileage or gas (except in special circumstances and with pre-approval).
- Contact the Transportation Department to arrange a district vehicle (van) or a car rental.
  - Request a gas card when driving district vehicles.
- Airline tickets are allowed when the cost of driving exceeds the cost of flying.
- Mileage reimbursement(s) must have back-up to verify mileage (i.e. Google Map) and must be attached utilizing the shortest mileage route. *\*Employees must be cleared by the MUSD Transportation Department in order for mileage reimbursement to be claimed.*
- If a district vehicle has been reserved for a conference then mileage reimbursement for private vehicles will be denied (except in special circumstances and with pre-approval).
- Transportation from/to the airport and parking are refundable when justified. Receipts are required for reimbursement.

### Meals:

- Madera Unified will only reimburse for the actual cost of a meal during district business and up to the per-diem allowable amount as per District Policy AR3350.
- Itemized receipts for meals must be attached to your reimbursement request, if the amount exceeds per-diem rate, the employee will only be reimbursed up to the per-diem rate.
- The district reimbursement form shall be accompanied by original, itemized receipts and any explanation necessary to document the expense. Please do not combine purchases when traveling with other employees or with family members. Each employee should have their own meal receipt.
- Do not claim meals that are provided at the conference.
- **Do not include any alcoholic beverages** in your reimbursement receipts.

### **NO RECEIPT, NO REIMBURSEMENT, NO EXCEPTIONS**

*Allow three to four weeks for reimbursements to be processed and checks to be mailed*