

Natomas Unified School District Procedures for Travel/Conference Approval and Reimbursement

TRAVEL/CONFERENCE APPROVAL PROCEDURE

- Complete the Travel/Conference Request form and attach a copy of the conference/workshop brochure or flyer.
- Submit the form to the site/department/program administrator for approval at least three weeks prior to the date of the conference.
- Once approved, the request form will be distributed as indicated on the form.
- Attendee then has the responsibility to work with the site/department/program administrator to complete registration, travel/transportation arrangements, lodging accommodations, etc.

Reimbursement Claiming Procedures

Complete a district Mileage Expense Claim form and submit to the site/department/program administrator within five working days of your return. This form must be accompanied by:

- a. A copy of the approved Travel Conference Request Form
- b. Conference agenda
- c. Per Diem Rate Charts (if applicable)
- d. Printout of Google maps or other (if applicable)

Reimbursable Expenses

All travel reimbursement requests must be submitted on a Mileage Expense Claim Form accompanied by the appropriate documentation, within five working days of return. Incomplete documentation will not be accepted for reimbursement.

- a. Registration – Actual registration cost. Include a copy of the registration form, as well as the “PAID” receipt.
- b. Lodging – Actual cost for moderate accommodations commensurate with the event and appropriate for a public school district. For appropriate rates refer to: <http://www.gsa.gov/portal/category/100120>
 - i. Shared, block, commercial or special rates must be utilized when available.
 - ii. If lodging is shared with another employee, each person will be reimbursed for only their actual expense.
 - iii. If lodging is shared with a non-employee (e.g. spouse, children, etc.), employee reimbursement is limited to the single occupancy rate. Claims must show the single occupancy rate.
- c. Meals – Per Diem is acceptable for overnight stays only.
- d. Transportation – Actual cost incurred and supported by original receipts including tolls and fares.
 - i. When attending a conference or meeting to which the employee has traveled by commercial carrier, the employee may rent a car at the terminal for local transportation when:
 1. It can be justified by the circumstances
 2. It has been authorized in advance
 - ii. Reimbursement for travel by private vehicle will be made at the district established per mile rate.
 - iii. When two or more employees are attending the same conference, ride-sharing is encouraged. When more than one employee shares a private vehicle, only one employee will be reimbursed for mileage expenses.

Non-Reimbursable Expenses include but are not limited to:

Personal expenses not essential to district business	Snacks/Beverages outside of meals	Personal phone calls
Internet fees unless required for conference “homework”	Transportation to/from entertainment	Leisure tours/side trips
Meals & Lodging that are already included in Conference	Alcoholic beverages	TV or movie rental
Travel/Lodging/Meals for extra time prior or after Conf	Expensed for Spouse/dependents	Traffic/Parking Citations

In an effort to expedite our processing timeline, please ensure the following is attached:

Conference Packet requirements: (separate packet for different vendors)

Conference Packet (Vendor for Conference Registration)

- Purchase Requisition (may include multiple attendees)
- Conference Request (1 per attendee)
- Conference Registration (2 copies)
- Conference Info (when, where, why)

Hotel Packet (Vendor for Hotel Accommodations)

- Purchase Requisition (may include multiple rooms)
- Hotel Confirmation - detailed including tax etc.
- Copy of Conference Request (1 per attendee)

Travel Packet (Vendor for Air/Train/car rental)

- Purchase Requisition
- Air Confirmation / Receipt
- Copy of Conference Request (1 per attendee)

Reimbursable Packet (Vendor = employee)

- Mileage /Expense Claim Form
- Printout of Google maps or applicable
(one from home to conf & one from work to conf – use lesser of the two)

- Per-Diem copy (<http://www.gsa.gov/portal/category/100120>)

Enter the City & State or the Zip Code where the conference took place, then click "Find Per Diem Rates"

The screen will show destination, county, lodging & meal per diems, print this page

ON THAT SAME PAGE, BELOW THE CHART, click "Breakdown of M&IE Expenses", print this page

These are the two pages required for per diem reimbursements.

- Conference Agenda
- Copy of Conference Request (if pertains to overnight stay)