

INSTRUCTIONS FOR TRAVEL REQUEST AND AUTHORIZATION FORM

Complete the top section and submit four copies on NCR paper for authorization. All travel must be approved and signed by the employee and appropriate administrator(s) prior to departure date. Requests for advances must be submitted to the Business Office at least seven days prior to departure. Upon return, complete the bottom section of the form (1 copy) including approval of appropriate administrator(s), attach all receipts and documentation, and submit to the Business Office within five working days. Complete this form even if you are not claiming any additional expenses.

Claim Number: Enter first three letters of last name followed by first two letters of first name followed by date of departure. John Doe leaving for a trip on February 1, 2016 would enter a claim number of "DOEJO020116". This will help with tracking forms.

Meals and Incidentals: A standard meal and incidental allowance is available for those trips that require an overnight stay. Expenses for meals up to \$11 for breakfast, \$12 for lunch, and \$23 for dinner, may be reimbursed without providing receipts. The District does not allow reimbursement for alcoholic beverages. If meals are included in the registration fee or air travel, they should not be claimed. The total meal allowance shall be paid for each complete 24 hours of travel. Departure and return times must be stated on the form in order to receive per diem for meals. If the conference activity for meal cost is a separate stated fee, such as a banquet or a lunch, the actual cost of the meal may be claimed. Incidental travel expenses of up to \$5 per 24 hour period of travel may also be reimbursed.

Trip	Breakfast	Lunch	Dinner
One-day trip	Not reimbursed	Not reimbursed	Not reimbursed
Multi-day trips - first day	Yes, if departure is prior to 7:00 am	Yes, if departure before 12:00 pm	Yes, if departure is prior to 6:00 pm
During multi-day trip	Yes	Yes	Yes
Multi-day trip - final day	Yes, if return is after 8:00 am	Yes, if return is after 1:00 pm	Yes, if return is after 7:00 pm

Lodging: Lodging shall not exceed single conference rates. If the conference rate is not available, traveler should obtain a government rate or the least expensive rate available. An itemized receipt showing final payment is required for reimbursement. Unless it is the established single conference rate, lodging expenses in excess of \$199 per night excluding taxes and other charges require additional substantiation. Employees must document reason(s) for the use of a higher lodging rate. These reasons may include 1) employee required to stay at lodging site, 2) employee is handicapped and requires "reasonable accommodation", 3) business will be conducted in late night meetings, 4) cost of transportation to alternative lodging equals cost of requested lodging, 5) lack of transportation to alternative lodging, 6) no alternative lodging available, 7) emergency travel, and 8) other. The employee must explain the reason above. If the employee is not able to meet the conditions above, the employee must document a "Good Faith" effort to obtain lodging from 3 vendors at or below the \$199 per night rate. This documentation must be attached to the "Travel Request and Authorization Form" claim form submitted at the time travel approval is requested. Personal phone calls will not be reimbursed.

Registration: Registration will be paid to the organization providing the registration fee form is attached. If employee prepays registration fees, a receipt is required upon submission of the final request. No advance will be paid to the employee.

Transportation: Airfare accommodations are normally Economy airfare and should be made through a district approved travel agent (currently available online through SWABIZ and CAL Travelstore). Travelers flying on Southwest Airlines should book "Wanna Get Away" fares as these are the least expensive. Exceptions to use the district approved travel services may be made when travel is not available through the approved service or an alternate source would create a lower cost. Exceptions require appropriate justification and approval by the appropriate vice-president or Superintendent/President and Chief Business Officer or designee. Any additional costs (early boarding, excess luggage, upgraded seating, etc.) must be approved in advance by the appropriate vice president or Superintendent/President.

Reimbursement for mileage will be at the IRS standard rate. Mileage reimbursement may not exceed round trip coach airfare. Mileage reimbursement can only be claimed on use of a personal vehicle. Rental vehicles are reimbursed at the cost of rental plus fuel charges.

Other Expenses: Other expenses such as parking, bridge tolls, or taxi will be reimbursed with proper receipts.

Request For Reimbursement: Within five (5) days after return from travel, the Travel Advance and Authorization Form should be signed, approved by appropriate Dean or administrator, and submitted to the Business Office along with all required receipts. Failure to complete the form in a timely manner may prevent the employee from receiving further travel advances.