

**REQUEST TO ATTEND
WORKSHOP/IN-SERVICE/TRAINING**

CONFERENCE/WORKSHOP REQUEST:

Submit a separate request for each employee attending a workshop. Be sure to submit requests at least **20 days** in advance to your supervisor for signature to allow for processing time. **Paperwork submitted outside of the 20th day parameter to Business Services may be returned.**

ATTACH BACKUP:

Required backup includes a brochure, conference/workshop flyer, or some type of communication which includes date, location, cost, itinerary, vendor name, address, phone number and contact person.

PAYEE INFORMATION:

Complete **All Information** on *Request for Conference Attendance* form.

SIGNATURES:

Proper signatures are required for processing. Remember, you cannot approve your own Conference and Travel Reimbursement Expense Claims. Signatures must include immediate supervisor and Business Services. **Out of state/country travel requests will require Cabinet and Board approval.**

AIR FARE:

Travel arrangements need to be made as soon as possible. Book your flight and print a confirmation form showing itinerary and costs. Attach the confirmation to your expense claim.

When opting to drive long distances rather than

flying, the District will only reimburse mileage cost up to the cost of 21 day advanced purchase commercial airfare.

*****Any changes or alterations made outside of district approved conference arrangements, which result in additional costs (i.e. room upgrades, flight changes), shall be at the employee's expense and will not be subject to reimbursement by the district.***

HOTEL:

When reserving a room, be prepared with the dates you wish travel and have a credit card ready to guarantee the room. **The credit card will not be billed; it only holds/guarantees the room when arrangements are made at least 3 weeks in advance.** Submit a requisition complete with the hotel confirmation to Business Services. It will then be processed into a Purchase Order. Request that the check for the full amount be given to you so that you can take it with you. Once the hotel receives your check, your credit card will be credited. **Please be advised that most hotels require the check 2 weeks prior to your arrival.**

****Prudent judgment is expected regarding lodging/hotel accommodations in highly expensive cities when appropriate alternatives are available. Accommodations at conference headquarter hotels are considered to be reasonable expenses.***

AFTER THE WORKSHOP/IN-SERVICE / TRAINING:

Original hotel receipts for lodging paid by SJUSD **must** be returned with the Conference Expense Claim form to Business Services.

CONFERENCE EXPENSE CLAIM:

Complete the entire Expense Claim form for each employee and return to Business Services **IMMEDIATELY AFTER TRAVEL IS COMPLETE.**

ITEMIZED RECEIPTS:

Include **original, itemized receipts** (each item and price) for all meals, materials or other items to be reimbursed by the District that have been **pre-approved** on your original Conference/Workshop Request form. **If workshop registration includes meal(s), attendee will not be reimbursed for meals outside of the conference itself.**

DAILY MEAL ALLOWANCE:

Meals will only be reimbursed for overnight conferences/workshops.

You will be paid the actual and necessary meal expenses incurred; up to **\$71.00 per day.**** The district per diem rate will be reduced by the value of the meal(s) included in conference registration, the adjusted per diem amount will be available for the meal period(s) not included in the conference registration. Reimbursement will be made for traditional meal periods only (i.e. breakfast, lunch, and dinner).

<u>Meal Period</u>	<u>Per Diem Value</u>
Breakfast	\$15
Lunch	\$20
Dinner	\$36

PERSONAL ITEMS:

Personal items, personal phone calls, additional snacks, movies, and alcoholic beverages are **NOT** approved expenditures. Tips for maid service, room service bellmen, or meal delivery fees are **NOT** reimbursed. Tips for shuttle, taxi, Uber or other ride-sharing services will be reimbursed at **10%**. Valet parking is not an approved expenditure. Meal gratuity is reimbursed at **15% pre-tax** where applicable.

MILEAGE:

The current IRS approved mileage reimbursement rate as of January 1, 2019 is **58** cents per mile calculated round trip from the work site to the destination as the actual mileage (your home, if shorter). However, the District encourages usage of the District vehicles when more than one individual is attending the same conference from the same site.

AUTHORIZATION:

Expense reimbursement claims **will NOT** be honored for trips made without prior authorization on the Request for Conference Attendance form.

PROCESSING TIME:

Conference Attendance requests **must be approved** prior to Business Services issuing payment. Please allow at least **30 days** to process a payment. **Follow listed procedures to eliminate unnecessary delays!**

Please note: *Some exceptions to the aforementioned guidelines do apply when there are compelling circumstances.*

TIPS TO EXPEDITE PAYMENT:

1. Note **pre-registration deadline**
2. Indicate **program to be charged and account code number**
3. Attach **separate requisition** for hotel check
4. Attach **proper back-up**
5. Get **appropriate approval(s)**
6. All categorical funding must be approved by **Authorized Administrator**
7. Indicate if check is to be mailed or returned

EXPENSE REIMBURSEMENT:

1. Attach & tape edges of **all** receipts to a separate sheet of paper. **COPIES WILL NOT BE ACCEPTED.** All receipts **must be itemized** and include names of all parties making a claim, if applicable. *Please do not use a highlighter, as it erases ink over time. Please remember to sign each receipt.*
2. Get **appropriate approval(s)**.
3. Submit Expense Claim forms within **30 days** of conference.



“AVOID TRIPPING WHILE TRAVELING”

Conference & Workshop Reimbursement Procedures

Use *Request for Conference Attendance* form to attend workshops, In-service trainings or other staff development activities, even if there is no cost to attend.

