



## Conference Request Form and Expense Claim Form Information

### **Request for Conference Attendance Form**

Submit the [Request for Conference Attendance](#) in Informed K12.

All employees **MUST** submit a Request for Conference Attendance prior to making any arrangements and attending conferences, even if there is no cost to attend.

Submit a separate request for each employee. Submit requests to your supervisor for signature **at least 20 days in advance of the conference**. Paperwork submitted outside of the 20<sup>th</sup> day parameter may be returned by Business Services.

### **Attach Back-up Documentation**

Attach a brochure, flyer, or other communication which includes date, location, cost, itinerary, vendor name and address, and contact person.

### **Signatures**

You **cannot** approve your own form. Proper signatures from your immediate supervisor and Business Services are required for processing. **Out of state/country travel requires Cabinet and Board approval PRIOR to making ANY registrations or reservations.**

### **Airfare**

Use a district credit card to book your flight. **One (1) airline bag charge** per flight is allowed, prior authorization is needed for additional airline bag charges.

When opting to drive rather than fly, the District will only reimburse mileage up to the cost of 21 day advance 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), will not be reimbursed by the district.**

### **Hotel**

Request a government rate. Use a district credit card to guarantee the room. The district credit card will not be billed; it only holds or guarantees the room. A purchase requisition will need to be created for a check to be mailed to the hotel. Most hotels require a check to be received 2 weeks prior to arrival.

In the event a check is not accepted then communicate with Business Services to check out the SJUSD-Purchasing credit card and to have the hotels credit card authorization form completed. The authorization form is to be completed by Business Services **only**.

\*Prudent judgement is expected regarding hotel accommodations in expensive cities when appropriate alternatives are available. Accommodations at conference headquarters hotels are considered to be responsible expenses.

## **Expense Claim Forms**

Submit the [Expense Claim](#) in Informed K12.

All employees **MUST** submit an Expense Claim for reimbursement of approved conference expenses immediately after travel is complete.

### **Authorization**

Expense reimbursement claims **will NOT** be honored for trips made without an approved Request for Conference and an approved Expense Claim.

### **Non-reimbursable Items**

The following items are **NOT** reimbursable:

- Personal Items
- Alcoholic Beverages
- Tips for maid service, room service, or meal delivery fees
- Additional Snacks
- Valet Parking
- Movies
- Personal Phone Calls

### **Daily Meal Allowances**

Meals will **ONLY** be reimbursed for overnight conferences.

Actual and necessary meal expenses incurred will be reimbursed. The district meal period rates will be reduced by the value of the meal(s) included in conference registration fees or hotel reservation charges. The other meal period rates will still be available.

### **Meal Period**

- Breakfast
- Lunch
- Dinner
- \$15.00
- \$20.00
- \$36.00

### **Per Diem Value**

A **15% pre-tax tip** will be allowed in addition to the meal period totals.

### **Itemized Receipts**

Submit **signed itemized receipts** (show each item & price) for all meals, materials, or other items to be reimbursed by the district that have been pre-approved on your original Request for Conference Attendance. Receipts must include names of all parties that are part of each receipt, if applicable. Receipts must be attached in Informed K12 to your Expense Claim. Please do not use a highlighter on receipts, as it erases ink over time.

### **Mileage/Transportation**

The current IRS approved mileage reimbursement rate as of January 1, 2020 is 57.5 cents per mile calculated round trip from your work site or home (whichever is shorter) to the destination as the actual mileage. Do not round mileage up or down. The district encourages carpooling and the use of district vehicles when more than one individual is attending the same conference.

Tips for shuttle, taxi, or other ride sharing services will be reimbursed at **10%**.

### **Processing Time**

Request for Conference Attendance and Expense Claim must be approved prior to Business Services issuing payment for any reimbursable expenses. Allow **30 days** after the final Expense Claim approval to process payment.

**Please note, some exceptions to the aforementioned guidelines do apply when there are compelling circumstances. These exceptions need to have Business Services approval.**