



CONFERENCE & TRAVEL

Conference and Travel requires pre-approval of expected expenses for registration, hotel accommodations, vehicle costs and reimbursement of employee expenses such as meals.

Pre-Authorization, Registration, Hotel, Vehicles and Reimbursement

- 1. Use the top portion of the online, fillable form ([Workshop Training Conference Pre-Authorization & Reimbursement Form](#)) to obtain supervisor approval for all anticipated expenses prior to the conference.** Hotel and registration fees to be paid by government Cal-card or processed for payment with a purchase order/check request can be included here and will be subtracted from total reimbursable expenses.
- 2. If a Visa Cal-Card is needed for hotel reservations and payment, please review guidelines** for appropriate use. Registration fees can also be processed and paid in Accounts Payable by submitting a copy of the pre-authorization form and registration materials. Receipts will need to be submitted for all forms of payment.
- 3. SLOCOE vehicles are available by reservation for conference travel.** A reservation request form with guidelines can be found at [Vehicle Requests](#). SLOCOE vehicle costs are charged separately by Maintenance Operations and Transportation, but are included in the top portion of the form for approval of estimated costs.
- 4. Complete the bottom portion of the form following travel** in order to indicate expenses not already paid or charged to a government Cal-card. While the top portion of the form indicates estimated costs for approval by a supervisor prior to travel, this portion of the form provides information on actual expenses to be reimbursed.
 - Meal expenses, incidental out-of-pocket expenses and personal vehicle mileage may be entered as appropriate for reimbursement.
 - Meal expenses may be reimbursed at the per diem rate when an overnight stay or travel outside the county occurs. Location-specific rates can be found here: gsa.gov/travel/plan-book/per-diem-rates. **Please attach evidence of the GSA-approved rate to reimbursement requests.**
 - Staff may not claim meals included in hotel expenses or conference fees, or meals otherwise provided. (Meals claimed for trips less than 24 hours without an overnight stay are taxable.)
 - Attach any receipts for registration, lodging, and incidentals. Incidental expenses (such as parking not already included in hotel charges, toll fees, or any unexpected costs) can be indicated at the bottom portion of the form as "Other."
 - Provide account coding and a total dollar amount.
 - Always attach a copy of the agenda, certification of completion or other proof of attendance, and original itemized receipts.
- 5. Submit the signed and approved form no more than 30 days after the event.** The minimum processing amount for a conference claim is \$20. Petty cash reimbursement is available for expenses under \$20.00.
- 6. Contact x213 or x212 if you have questions regarding reimbursements.**

ATTACHMENTS: *Superintendent Policy 3350: Travel Expenses*
County Office Regulation 3350: Travel Expenses

Remember! No alcohol purchases or spouse's meals on receipts. Per diem rates apply.

Superintendent Policy 3350: Travel Expenses

Status: ADOPTED

Original Adopted Date: 04/22/2016 | **Last Revised Date:** 10/27/2023 | **Last Reviewed Date:** 10/27/2023

The County Superintendent recognizes that County Office of Education (COE) employees may incur expenses in the course of performing their assigned duties and responsibilities. To ensure the prudent use of public funds, the County Superintendent or designee shall establish rules to keep such expenses to a minimum while affording employees a reasonable level of safety and convenience.

The County Superintendent shall authorize payment for actual and necessary travel expenses incurred by any employee performing authorized services for the COE, whether within or outside COE boundaries. (Education Code 44032)

The County Superintendent or designee shall establish procedures for the approval of travel requests and the submission and verification of expense claims. He/she also shall establish reimbursement rates in accordance with law and COE policy.

An employee shall obtain approval from the County Superintendent or designee prior to traveling. The County Superintendent or designee may approve travel requests in accordance with the adopted budget and upon determining that the travel is authorized or assigned by the employee's supervisor, is necessary to attend a conference or other staff development opportunity that will enhance employee performance, and/or is otherwise necessary to the performance of the employee's duties. Travel expenses not previously budgeted may be approved on a case-by-case basis by the County Superintendent or designee if he/she determines that the travel is essential and that resources may be obtained or redirected for this purpose.

All out-of-state travel for which reimbursement will be claimed shall be approved in advance by the County Superintendent.

Reimbursable travel expenses may include, but are not limited to, costs of transportation, parking fees, bridge or road tolls, lodging when COE business reasonably requires an overnight stay, registration fees for seminars and conferences, telephone and other communication expenses incurred on COE business, and other necessary incidental expenses such as meals not already provided. (see <https://www.gsa.gov/travel/plan-book/per-diem-rates/mie-breakdown?gsaredirect-mie>).

COE shall not reimburse personal travel expenses including, but not limited to, alcohol, entertainment, laundry, expenses of any family member who is accompanying the employee on COE-related business, personal use of an automobile, and personal losses or traffic violation fees incurred while on COE business.

Except as otherwise provided, reimbursement of travel expenses shall be based on actual expenses as documented by receipts.

Authorized employees shall be reimbursed for the use of their own private vehicles in the performance of assigned duties, on either a mileage or monthly basis as determined by the County Superintendent or designee. (Education Code 44033; Administrative Regulation

3350.1: Use of Personal Vehicle for County Office of Education Business)

The mileage allowance provided by the COE for employees' use of their private vehicles shall be equal to the rate established by the Internal Revenue Service.

Vehicles should be shared whenever possible to minimize travel costs. No employee shall be entitled to reimbursement for automobile travel when he/she is transported free of charge or by another employee who is entitled to or submits a claim for the expense reimbursement.

The County Superintendent or designee shall establish a per diem allowance for meal costs incurred while traveling on COE business based on the location and hours of travel. The per diem allowance shall not exceed the standard meal allowance for business-related travel prescribed by the U.S. General Services Administration (<https://www.gsa.gov/travel/plan-book/per-diem-rates/mie-breakdown?gsaredirect=mie>).

Any expense that exceeds the maximum rate of reimbursement established by the COE shall be reimbursed only with the approval of the County Superintendent or designee.

All expense reimbursement claims shall be submitted on a reimbursement claim form, within 10 working days following return from travel when possible. Reimbursement claim forms must be submitted for payment no later than the last day of the month following the month in which expenses were incurred. Late claims will not be paid. The form shall be accompanied by receipts and any explanation necessary to document that the expenses meet COE criteria for reimbursement.

The County Superintendent or designee shall approve expense claims only upon verifying that all necessary documentation is provided and that all expenses are appropriate and related to COE business. If an expense claim is disallowed due to lack of documentation or inappropriate expenses, the employee is personally responsible for any improper costs incurred.

When necessary, the County Superintendent or designee may approve a cash advance, not to exceed the estimated out-of-pocket reimbursable expenses, to an employee authorized to travel on COE business. Within 7 working days following return from travel, the employee shall submit a final accounting with all necessary supporting documentation. He/she shall refund to the COE any amount of cash advance exceeding the actual approved reimbursable expenses.

Policy Reference Disclaimer:

These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

Management Resources

Internal Revenue Service Publication

Description

Per Diem Rates (For Travel Within the Continental United States), Publication 1542

Website

[U.S. General Services Administration, Per Diem Rates](#)

Website

[Internal Revenue Service](#)

State

Ed. Code 42634

Description

Itemization of expenses

Ed. Code 44016	Travel expense to employment interview
Ed. Code 44032	Travel expense payment
Ed. Code 44033	Automobile allowance
Ed. Code 44802	Student teacher's travel expense

Cross References

Code	Description
3100	Budget Adoption And Revision

County Office Regulation 3350: Travel Expenses

Status: ADOPTED

Original Adopted Date: 10/27/2023 | **Last Reviewed Date:** 10/27/2023

Employees of the San Luis Obispo Office of Education (SLOCOE) may be provided automobile transportation for official use through (1) office-leased official vehicles; (2) employees' private automobiles; or (3) cars rented from a commercial vendor. The following regulations shall govern office-paid automobile transportation for employees.

1. Office-Provided Vehicles shall be used whenever possible for occasional travel within the County unless other arrangements are specifically approved by the supervisor. Such use shall be for official purposes only and shall be subject to the approval of the County Superintendent or designee. The only reimbursable expenses related to such uses are fuel, parking fees, tools or emergency repairs in accordance with the "Breakdown Procedures" memo located in each vehicle.
2. Employees Personal Vehicle may be used for official use when specifically authorized by the supervisor. The following conditions shall apply to such use:
 - a. Mileage reimbursement for private vehicle use will be made when
 - i. It is the least expensive means of travel, or
 - ii. Two or more employees ride together to create a savings, or
 - iii. Use of the vehicle for official business was necessary at the destination, or
 - iv. When an employee has been granted written authorization to use a private vehicle on a regular basis because his/her assignment requires such use and the use represents a savings to the office.
 - b. The employee must submit and maintain on file with the office a current "Use of Automobile" form (fillable via Laserfiche at [https://lfforms.slocoe.org/Forms/IGbkU\(https://simbli.eboardsolutions.com/SU/WL0qXfA5plusPUBGKwRtdVO2g==\)](https://lfforms.slocoe.org/Forms/IGbkU(https://simbli.eboardsolutions.com/SU/WL0qXfA5plusPUBGKwRtdVO2g==))), and maintain in effect minimum automobile insurance coverage for property loss, property damage, and public liability insurance, as required the State of California.
 - c. The employee shall ensure that seat belts are used by the driver and all passengers at all times.
 - d. Mileage reimbursement for an employee who is authorized to regularly use his/her private automobile for official use will be calculated on actual miles driven by the employee while conducting official business. For employees who travel to multiple school sites within the county during a single work day, the beginning point for recording mileage will be the shorter of either (1) the actual mileage from the employee's home to the first work location, or (2) the mileage from a designated "work base" to the first work location. The ending point for recording mileage will be the shorter of either (1) the actual mileage from the final work location to the employee's home, or (2) the mileage from the final work location to the designated "work base." The "work base" will be designated in writing by the supervisor as the location where the employee would report when he/she is not on the road. Except as provided above, an employee may not receive reimbursement for commuting miles between home and work.
3. Rental Vehicles may be used for official purposes when travel outside of San Luis Obispo County is required. Such use must be authorized in writing by the employee's supervisor.
4. Miscellaneous Conditions: Exceptions to these regulations may be granted by the Superintendent or designee.

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Management Resources References

Management Resources References	Description
Internal Revenue Service Publication	Per Diem Rates (For Travel Within the Continental United States), Publication 1542
Website	U.S. General Services Administration, Per Diem Rates - https://simbli.eboardsolutions.com/SU/fOFETn5Hslshdngflkat4Me5w==
Website	Internal Revenue Service - https://simbli.eboardsolutions.com/SU/Q4VQpg5n4iGWL4GteBcOQw==

State References

State References	Description
Ed. Code 42634	Itemization of expenses

Ed. Code 44016	Travel expense to employment interview
Ed. Code 44032	Travel expense payment
Ed. Code 44033	Automobile allowance
Ed. Code 44802	Student teacher's travel expense

Cross References

3100

Description

Budget Adoption And Revision -
<https://simbli.eboardsolutions.com/SU/K2v0Hplus4cX2VOHJ3vhdORaw==>