

Please contact Susan Buchton in Business and Administrative Services for information not covered below.

TRAVEL REQUEST/CLAIM FORM INSTRUCTIONS

This form must be filed with Fiscal Services at least **ten** working days before the registration fees or advancement to employee can be issued.

BEFORE YOU LEAVE . . .

1. Complete sections A, B and C of form (referred to as TR).
 - A. One form per employee.
 - B. Estimate your expenses for each item (see reimbursement limits below).
 - Airfare – You are encouraged to purchase your tickets through the current district travel agent to insure they are refundable; however, it is not a requirement. If you choose to purchase your ticket through other means, you will not receive the state rate and your ticket will most likely be non-refundable. If the conference is cancelled, the cost of the ticket will be charged to your department budget.
 - Registration – If conference registration is to be paid in advance by the District, you must attach the completed registration form and check the appropriate boxes under "Registration" on the Travel Request form. If you choose to pay the registration yourself, please let us know by checking the "I will pay myself" box under "Registration" on the Travel Request form.
 - Tuition Reimbursement – If you are requesting Tuition Reimbursement, please provide documentation for registration and tuition payment.
 - Advancement – You may request an advancement of expenses, up to \$2,000, upon approval of your request. This advancement can be requested by completing the box "TOTAL ADVANCE REQUESTED" (B1).
 - Sign and date the Travel Request form.
2. Forward all copies of the Travel Request form to your department chair/supervisor. The request will be returned to you upon approval. Retain the form to complete section D upon your return.

DEPARTMENT CHAIR/SUPERVISOR . . .

3. If you approve the request and authorize all expenses, sign the form, date it and forward all copies to Fiscal Services, mail station 6.
4. If you approve the request but for a limited reimbursement amount, you must fill in the "TOTAL expenses limited to:" box (B2).
5. If you do not approve the request, notify the employee.

AFTER YOUR RETURN . . .

6. Claim must be submitted to Fiscal Services **five** working days after your return.
 - A. Complete section D by listing all actual expenses. List all expenses, even those paid by the District.
 - B. Receipts are required for all expenses except mileage and meals. (Exception: all receipts are required for department meetings, including meal receipts.) All expenses not supported by receipts when they are required, will be disallowed.
 - C. If expenses exceed any employee advancement, reimbursement will be made to the employee within ten working days.
 - D. If advancement exceeds actual expenses, the employee must reimburse the District within five working days.

SCHEDULE OF EXPENSE REIMBURSEMENTS

Necessary expenses incurred by an employee on an authorized trip shall be reimbursed at actual costs, but not to exceed the following schedule:

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|-------------------------------------------|--------------------------------------------|
| • Transportation (except private vehicle) | Actual Cost |
| • Private Vehicle | Current IRS Rate |
| • Auto Storage | Actual Cost |
| • Lodging | Actual Cost |
| • Meals | \$40.00 per day (see 6.B. exception above) |
| • Registration | Actual Cost |

Please refer to Board Policy IV.F or Procedure IV.C-04 for further guidelines and clarification of the above schedule.

Additional Information...

- Plaza Travel (phone # 858-451-2880) is available for booking airline tickets, car rentals, and hotel reservations.
- Airline tickets at the state rate are available. For more information contact Susan Buchton at ext. 6458.