Travel / Conference Instructions

District travel procedures have been developed to comply with Board Policy / Administrative Regulation 3350 and Education Code 44016, 44032 and 44033. It applies to all individuals who travel to workshops, conferences, meetings or other related activities under one or more of the following circumstances:

1. Travel costs which are funded by any program administered by the district.

2. Travel as a representative of the district (whether or not the cost of such travel is reimbursed).

3. Travel while on paid status. Travel which takes place before final approval is secured will be considered an unauthorized purchase and the traveler will become financially liable for all travel expenses.

Application to Attend an Educational Event

- ¾ The Application to Attend an Educational Event form must be completed prior to travel.
- ¾ Once you have a completed and signed Application to Attend an Educational Event form, you must complete a Munis requisition and attach the form as well as all other required travel documentation.
- ¾ If no requisition is required (see below under General Information) an Application to Attend an Educational Event form is still required and must be attached to your (EC1) Conference Reimbursement Form.

GENERAL INFORMATION

A requisition for travel must be completed and approved for:

- ¾ Travel to destinations more than 80 miles from the district's boundaries.

- ¾ Any out-of-district travel that requires an on-the-job substitute for the person traveling.

- ¾ Any travel that requires an overnight stay.

No requisition is required for:

- ¾ In-district travel

- ¾ Same-day travel to destinations within an 80 mile radius of the district's boundaries if no substitute is required

Pre-Payment Requests

When requesting pre-payment by the district for travel expenses such as transportation, registration, lodging, and/or a cash advance, please observe the following requirements:

1. The completed Munis requisition must be received by the purchasing department, fully approved, at least 4 weeks prior to the date the first pre-payment is required.

2. Prior to creating a Munis requisition, an Application to Attend an Educational Event form must be approved.

3. Prior to entering a Munis requisition, the traveler(s) must make any necessary hotel reservations in their own name. The reservations must be able to be canceled, without cost or penalty. Reservations must be booked directly through the hotel, NOT through a third party vendor (like Hotels.com). The district cannot pay third party vendors.

4. Travelers must submit completed registration forms, and lodging confirmation(s) with their requisition. A conference brochure which includes date(s), location, cost, and any meals included, must be attached to the requisition

5. Purchase Orders and/or warrants for transportation, registration, and lodging will only be made payable to the specified agency, not to the traveler.

<u>Air Transportation</u>

<u>Procedure for requesting prepaid air transportation</u>:

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Travel / Conference Instructions

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