

Mark Twain Union Elementary School District

EMPLOYEE CONFERENCE/TRAVEL REQUEST & CLAIM FORM

PLEASE READ THE FOLLOWING DIRECTIONS AND ANSWER APPROPRIATE QUESTIONS BEFORE SUBMISSION OF THE ATTACHED TRAVEL AND CONFERENCE REIMBURSEMENT REQUEST

DOCUMENTATION FOR REQUEST:							
Registration	<ul style="list-style-type: none"> ▪ Documentation of conference/meeting showing registration information. ▪ Copy of event agenda. ▪ Vendor acceptable payment method. Payment method _____ 						
Mileage IRS standard mileage rate 58 cents per mile for business miles effective Jan 1, 2019.	<ul style="list-style-type: none"> ▪ Personal Vehicle – Calculate round trip miles <u>from school site</u> and multiply at the approved IRS reimbursement rate. Document mileage by printing map quest or google map (address to address) ▪ MILEAGE one way _____ X 2 = _____ reimbursable miles @ \$0.58 ▪ Is advance required? Yes ___ No ___ 						
PER-DIEM MEAL RATES LOW COST / HIGH COST AREAS	Date	Date	Date	Date	Date	Total	High cost areas for meal reimbursement per IRS guidelines. Los Angeles (Jan 1-March 31) Mill Valley/San Rafael/Novato (Oct 1-Oct 31 & June 1-Sept 30) Monterey (July 1-Aug 31) Napa (Oct 1-Oct 31 & May 1-Sept 30) San Francisco San Mateo/Foster City/Belmont Santa Barbara Santa Monica Sunnyvale/Palo Alto/San Jose Per Diem Meals only reimbursed for conferences requiring overnight arrangements (Taxable Fringe Benefit Guide)
Breakfast @ \$10 / \$12							
Lunch @ \$12 / \$14							
Dinner @ \$22 / \$26							
Meal Totals							
Is advance required? Yes ___ No ___ Per Diem Meals & Mileage expenses may be claimed without receipts unless required by funding source.							
Lodging	<ul style="list-style-type: none"> ▪ Hotel requested ▪ Number of nights requested ▪ Number of people staying in the room ▪ Rate per night (include discount or discount code if applicable) ▪ Vendor acceptable payment method. Payment method _____ 						
Travel	<ul style="list-style-type: none"> ▪ AIR – Provide flight itinerary (from / to and times of flights) ▪ AIR – Estimated cost of flight ▪ TRAIN or BUS - Same requirements as Air ▪ DISTRICT VAN – Submit request to Transportation Department 						
Car Rental	<ul style="list-style-type: none"> ▪ Documentation of vendor and cost of car rental. Include the number of days, and who will be driving the vehicle. Payment method _____ 						
Other	<ul style="list-style-type: none"> ▪ PARKING, TAXI, SHUTTLE, TOLLS, or OTHER – Estimate of anticipated cost. 						
Sub Costs	<ul style="list-style-type: none"> ▪ How many days will a sub be required? _____ Dates _____ 						

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Prospective travelers must complete this form and attach all required documents.

Note: See pages 1 and 3 for instructions. (They contain mileage and meal rates and documentation requirements).

Be sure to complete each step applicable to your trip. Requestor and Supervisor must review documentation and sign before submission to the District Office for approval. The Superintendent and/or Business Director will approve or deny the request.

ATTENDEE NAME	SITE	DATE
ADDRESS	TELEPHONE / E-MAIL	
CONFERENCE TITLE	CONFERENCE SPONSOR	
CONFERENCE LOCATION	CONFERENCE DATE(S)	
CONFERENCE PURPOSE	SUB DATE(S)	

ACCOUNTABLE EXPENSES – <i>DOCUMENTATION & ORIGINAL RECEIPTS REQUIRED. <u>Per Diem Meals & Mileage</u> expenses may be claimed without receipts unless required by funding source.</i>	REQUIRED DOCS ATTACHED Y- N- NA	EMPLOYEE COST ESTIMATE	OFFICE USE ONLY		
			ACTUAL COST	REQ. OR PO #	PAYMENT METHOD
REGISTRATION - (Attach copy of registration and event agenda)					
MILEAGE - (Attach map quest or equivalent verification if claiming mileage reimbursement)					
MEALS - (Complete attached meal schedule if claiming meal reimbursement)					
LODGING – (Complete hotel reservations and attach copy if claiming lodging reimbursement) Copy of hotel billing receipt is required after event.					
AIR, TRAIN OR BUS - (Complete reservations and attach copy if claiming reimbursement) (List round trip fare including taxes and fees– A paid receipt is required)					
CAR RENTAL/FUEL - (Rental Agreement and proof of payment Required, exclude personal use)					
OTHER – (Parking, Taxi, Shuttle, Tolls, etc., Receipts Required)					
SUB COSTS - SUB days required? (FULL = \$130.40 / HALF DAY = \$78.25)	Days	Est			
PRE-APPROVAL REQUIRED Must be signed <u>prior</u> to travel (Out-of-state travel requires Board Approval)		\$		TOTALS	
Employee Signature		Date	I certify that all expenditures are actual and necessarily incurred in the performance of my official duty and supported by true and proper documentation.		
Supervisor Signature		Date			
Account Code			District Approval		Date

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SUBMISSION PROCEDURES:

Employee submits travel request claim form and documentation to supervisor for approval. Supervisor will determine the resource funding the activity. Employee will submit approved documents to the district office for processing. **MAKE A COPY FOR YOUR RECORDS.** *After notification that the request has been approved it is up to the employee to register for the conference, make all hotel, auto, and air reservations.*

DISTRICT OFFICE PROCEDURES: The District office will review the request for all required supporting documentation and when complete will submit to Superintendent or Business Director for approval. After the request has been approved the employee will be notified by Email which will include a copy of the completed request.

SETTLE-UP PAYMENTS AFTER MEETING/CONFERENCE OFFICE PROCEDURES: The employee makes adjustments in expenses not requiring receipts. Adjust claimed expenses if the employee did not attend all or part of the conference/meeting or meals were provided at the conference/meeting, and employee previously included in the pre-approval process. The employee makes adjustments if necessary in expenses requiring receipts that differ from approved. The employee attaches additional necessary receipts to his/her copy of the pre-approved request. The employee will obtain approval from the supervisor if costs are greater than pre-approved. The employee will sign and date certification and return to the district office for final reimbursement. *This step is necessary even if an additional change in reimbursement is not required.* District office will review the final claim and prepare reimbursement or adjustments.

DOCUMENTATION FOR REIMBURSEMENT:	
Registration	▪ Invoice for event
Lodging	▪ Bill from hotel when checking out even when registration is paid by DO.
Travel	<ul style="list-style-type: none"> ▪ AIR – Ticket ▪ TRAIN or BUS (Same requirements as Air) ▪ DISTRICT Van or Personal Vehicle – Document mileage by printing map quest or google map (address to address)
Other	<ul style="list-style-type: none"> ▪ CAR RENTAL – Invoice from rental agency and applicable gas receipts. ▪ MILEAGE – no additional documents other than pre-approval submission. ▪ PARKING, TAXI, SHUTTLE, TOLLS, or OTHER – Invoice or receipt.
Meals	▪ No additional documents other than pre-approval submission and final claim certification signature.

Maximum Amount to be reimbursed:

Per Diem Meal Rates		Breakfast	Lunch	Dinner	Total
High cost area		\$ 12.00	\$ 14.00	\$ 26.00	\$ 52.00
Low cost area		\$ 10.00	\$ 12.00	\$ 22.00	\$ 44.00
Meal eligibility while in travel	Leave before	6:00 am	10:30 am	6:00 pm	6:00 am
	Return After	10:00 am	2:30 pm	6:00 pm	6:00 pm

NOTICE! - The District does not require the employee to fund this activity so there are several ways to pay for these activities. An employee may prepay with a personal credit card and or funds and then request reimbursement. – **OR – they can come to the district** office and the business department will assist in making payment and scheduling by using the district credit card, issue a PO if accepted, and or arrangements for payment with a District check