



Travel / Conference Instructions

Munis Version 11.2

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 while on leave is not subject to the district policy.

Final approval must be secured before the travel is commenced. Final approval is secured when all requisite signatures have been obtained and the specified travel funds have been encumbered on purchase orders. Any 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

- The *Application to Attend an Educational Event* form must be completed prior to travel.
- Once you have a completed and signed an *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.
- 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:

- Travel to destinations more than 80 miles from the district's boundaries.
- Any out-of-district travel that requires an on-the-job substitute for the person traveling.
- Any travel that requires an overnight stay.

No requisition is required for:

- In-district travel
- 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.



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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 cancelled, 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 the 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.

Air Transportation

Procedure for requesting pre-paid air transportation:

1. At least four weeks prior to departure, visit the website of the airline that you plan to use. Choose an itinerary that suits your travel plans.
2. Complete the *Airline Request Form*.
3. Print the itinerary and write your full legal name, date of birth, and phone number on the itinerary. Attach your chosen itinerary and the airline ticket request form to your Munis requisition.
4. When your completed travel approval form is received in Purchasing, your itinerary will be purchased. In the event that your itinerary is not available when we are ready to purchase it, you will be contacted by the purchasing office to discuss alternative itineraries.

Following is a list of airline websites – these are the most frequently used airlines, but travelers may choose other airlines if necessary:

www.southwest.com
www.aa.com

www.jetblue.com
www.united.com

www.delta.com

Lodging

Please note the following two sections of the WCCUSD travel policy – if either of these sections applies to your lodging request, additional approvals will be required (a waiver):

- *Section 3.a.3 – Lodging maximums*
 - If your lodging exceeds \$185 per night, you must provide written justification of the necessity to stay at a higher cost facility.
- *Section 3.a.2 – Lodging under 50 miles*
 - If you request lodging that is less than 50 miles from the district's boundaries, you must provide written justification for your request.

Procedure for requesting pre-paid lodging:

1. *At least four weeks prior* to first night of stay, contact the hotel and make reservations for your stay using your credit card. Book directly through the hotel, NOT through a third-party vendor. Get a confirmation letter from the hotel that includes:



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- the hotel name and address
 - your name
 - the cost per night plus any tax amounts
 - DO NOT reserve through third party vendors like Hotels.com, the District cannot pay third-party vendors.
 - the dates of your stay
 - your confirmation number
2. Submit the confirmation letter with your travel approval requisition.

Payment will be mailed to the hotel after your fully approved travel requisition is received in Purchasing. In the event that your travel requisition is received too late for pre-payment, you may seek reimbursement by providing receipts to accounting upon your return.

Reimbursement Requests

When requesting reimbursement by the district for travel expenses such as transportation, registration, lodging, and/or meals, please observe the following requirements:

1. Within 10 days of completing travel, a **Travel/Conference Expense Claim** form (EC1), plus all required receipts and/or proof of expenses, must be submitted to accounting in order for the reimbursement request to be processed. Documentation regarding the conference must be attached to the form in order to secure proper approvals.
2. An estimated amount for reimbursable expenses must be encumbered on a requisition in Munis. When you submit your reimbursement claim to accounting, you will need to include the requisition number on the form (EC1).
3. Out-of-State travel requires prior written approval by both Division Head and Superintendent.

Questions Regarding Travel Contact: Purchasing Department, 231-1198