



INSTRUCTIONS FOR CONFERENCE ATTENDANCE AND TRAVEL EXPENSES TO BE SUBMITTED ON A TRAVEL ALLOWANCE FORM

POLICIES TO REFERENCE: [Salt Lake City School District Policy F-3 F-3 Administrative Procedures](#)

Before filling out the Request for Conference and Travel Allowance, the traveler should make sure that the conference/travel has been authorized by their principal/department supervisor. Work with the school/department secretary to complete the form and all necessary paperwork for the conference.

A Purchase Order should be prepared to cover the cost of Conference Registration fees. All conference information should be attached to the Purchase Order. The attendee(s) should be listed on the Purchase Order, as well as the date(s) of the conference, and the location of the conference. **No travel arrangements should be made until the Purchase Order has been approved.**

Once the purchase order has been approved, fill out the Travel Allowance form, making sure to do the following:

- Personal information should be filled out completely (including employee name, employee number, position/title, school/department, an email address for correspondence, and the employee signature).
- Conference Information must be included. Fill out the date and time that the conference begins and ends. **Attach an agenda** to the Request for Conference and Travel Allowance.
- Ensure that a valid Account Number has been entered on the form, and that the account being used has the funds necessary to cover the expenditures incurred.

Traveler Must Select Payment Option

- Option 1: Traveler receives \$42.00 for all ground transportation costs. Per diem and ground transportation will be deposited **before** the trip if forms are submitted 3 to 4 weeks in advance.
- Option 2: Traveler will be reimbursed for allowable ground transportation costs and luggage fees (receipts must be submitted) **after** completion of the trip. Any per diem or reimbursements will also be paid **after** completion of the trip and submission of receipts.

AIRFARE:

- The school/department secretary should contact State Travel (801-538-3350) to check on dates and times of flights. The flights should be arranged to coincide as closely as possible with the conference times. When State Travel is used, the employee's airfare will be paid by the district, and no reimbursement will be necessary. This is the preferred method of booking flights for employee travel.
- The lowest airfare should be reserved.
- Please list the exact amount of the airfare on your Travel Allowance form, do not round to the nearest dollar.
- If the employee chooses to stay additional days, or chooses to fly to or from another location, and the cost of the ticket is more than the cost of the lowest fare out of and into Salt Lake, the employee must pay the additional amount to the District prior to the airline reservation being made.
- Once the flight has been reserved, the Request for Conference and Travel Allowance form should be submitted ASAP. The ticket can only be authorized through the district office, and this cannot happen until all necessary paperwork,

BUSINESS ADMINISTRATION

p 801. 578.8332
f 801. 578.8262

Salt Lake City School District
440 East 100 South
Salt Lake City, Utah 84111

www.slcschools.org

signatures, and account numbers have been submitted. State Travel will only hold the flight for 12-24 hours after you've reserved it. The forms can be faxed or scanned and emailed, but the original documents must be turned in within one week.

- The flight times (date and time leaving Salt Lake City – date and time returning to Salt Lake City) should be entered on the Travel Allowance form.
- ***In the event that an employee chooses to drive to a distant conference instead of flying***, the lower amount of the lowest airfare per State Travel OR the mileage will be reimbursed to the employee. The amount reimbursed will be verified by Business Administration.

MILEAGE (FOR CONFERENCES THAT ARE IN-STATE, AND NO FLIGHT IS NECESSARY):

- When the conference is within driving distance, the employee will be reimbursed for the mileage to the conference. This will be based on the mileage in MapQuest or Google Maps. The mileage will be reimbursed at the current IRS rate, which is **\$0.54** per mile effective **1/1/16**.
- Employees using district vehicles and fuel cards will not be reimbursed for mileage.

REGISTRATION:

- Registration for conferences must be paid through the district. A Purchase Order must be processed as detailed above, and a check or PO Number should be submitted to the conference. The cost of the conference, as well as the Purchase Order number used to pay for the conference, must be submitted on the Travel Allowance form. If the conference will only take payments by credit cards, please contact the Business Administration office for instructions.
- No registration fees should be paid BEFORE the conference has been approved through a Purchase Order and/or a Request for Conference and Travel Allowance form.
- In the event that a conference is approved, and an employee pays for the conference due to extreme circumstances, that employee will be reimbursed using the Request for Conference and Travel Allowance form. A billing statement or bank statement will be required in order to process a reimbursement.

PER DIEM FOR MEALS:

- Per diem rates are determined using the IRS federal approved rates for the city in which the conference is held. These rates are available on the Business Administration page of the District Website, or can be linked here: <http://www.gsa.gov/portal/category/21287>
- When determining meal allotments, amounts must equal the IRS Federal approved M&IE rate, and will be broken down by percentages (17% for breakfast, 23% for lunch, and 60% for dinner) as in the example which follows:
 - EXAMPLE: If the meal rate = \$64.00
 - Breakfast – 17% = \$10.88
 - Lunch – 23% = \$14.72
 - Dinner – 60% = \$38.40
- Per diem is determined using the employee's travel time, as well as the beginning and end times of the conference. Meals that will be provided by the conference must be noted, and the amounts for those meals subtracted from the per diem amount.
- Guidelines for meals:
 - Departures:
 - If flight leaves before and up to 9:00 am, breakfast can be included. (If driving, up to 8:00 am.)
 - If flight leaves before and up to 2:00 pm, lunch can be included. (If driving, up to 1:00 pm.)
 - If flight leaves between 5:00 pm and 10:00 pm, dinner can be included. (This is the same for driving.)
 - Arrivals:
 - If arriving after 7:00 am, breakfast can be included.
 - If arriving 12:00 pm or after, lunch can be included. (Same for driving.)
 - If arriving 5:00 pm or after, dinner can be included. (Same for driving.)
- The per diem information turned in on the Travel Allowance form may be corrected by the Business Administration or Accounting departments, based on travel times and conference times, and on the meals provided by a conference.

LODGING:

- When reserving the hotel/lodging, employees must use a **personal credit card** (**DO NOT** use a district purchasing card) to hold the room(s). The employee should then obtain a copy of the hotel's Credit Card

Authorization Form, and a copy of the reservation (usually an email listing the reservation/confirmation number), and include these with the Travel Allowance form that is submitted.

- Once the travel has been approved, Business Administration will complete the Credit Card Authorization Form. Room and tax will be paid - any incidentals are the responsibility of the traveler.
- Employees should not pay for hotel rooms with a personal credit card unless there are extenuating circumstances (with permission from the Business Administration office), and the travel has already been approved. In the event that an employee is required to pay for their lodging, they will be reimbursed at the federal approved rate for the city to which they are traveling, as per the district's travel policy. The district WILL NOT reimburse any amounts above the federal rate, which can be obtained by clicking the per diem link on the Business Administration web page, or here: <http://www.gsa.gov/portal/category/21287>

GROUND TRANSPORTATION:

- When traveling by plane, travelers must select one of the following two options when completing the Travel Allowance Request form:
 1. Advance payment of \$42.00 for ground transportation and/or parking charges; OR
 2. Reimbursement after travel for allowable ground transportation and parking expenses when submitted with receipts (see [F-3 Administrative Procedures](#) for allowable expenses).
- Employees using district vehicles will not be eligible for mileage reimbursement or ground transportation.

The fields on the Travel Allowance forms with an asterisk (*) should only be filled out upon approval of special circumstances as described above.

As you complete your Travel Allowance form, make sure you've done the following:

- ☐ Create a Purchase Order for the conference registration.
- ☐ Reserve a hotel room using a personal credit card. Get a Credit Card Authorization Form and turn it in with the Travel Allowance form.
- ☐ Reserve flights with State Travel. They will be approved by the district office.
- ☐ Double check form to make sure all information has been entered and is accurate.
- ☐ Sign and date the form.
- ☐ Obtain the signature of the Principal or Program Director.
- ☐ All schools must obtain the signature of the Associate Superintendent BEFORE travel arrangements can be completed.
- ☐ All other departments must obtain the signature of the Business Administrator BEFORE travel arrangements can be completed.
- ☐ Schools should send travel forms to the Associate Superintendent's office for completion of travel arrangements.
- ☐ Other departments should send travel forms to the Business Administration office for completion of travel arrangements.

PLEASE NOTE:

- Per diem funds will be deposited into the employee's account that is on file for payroll direct deposits. If the traveler chooses *option 1*, Accounting will deposit the money 2 to 3 weeks prior to travel. If the traveler chooses *option 2*, the funds will be deposited after the completion of travel and submission of necessary receipts. This will be a separate deposit from payroll deposits. Per diem funds cannot be guaranteed for Travel Allowance forms that are submitted with less than 3 to 4 weeks until the trip.
- Book early and submit Travel Allowance forms early. This will save money through early bird registration fees and cheaper airfares.
- Only reserve airfare for employees who are confirmed for travel. Consider booking refundable tickets.
- If a cancellation is necessary, notify the district office ASAP. Any per diem funds issued will need to be returned to Accounts Payable, or a personal check reimbursing the district for any funds paid to the employee will need to be submitted, within 10 days of the cancellation. Please note that some registration and airline fees may be non-refundable, and will be required to come out of the budget listed for payment on the Travel Allowance form.
- All forms will be verified by the Business Administration office, and amounts will be changed if a correction is necessary.



REQUEST FOR CONFERENCE AND TRAVEL ALLOWANCE

CONVENTIONS/WORKSHOPS/ TRAVEL EXPENSES AND REIMBURSEMENTS

For Business
office use only:
Circle option:
A B

***ALL TRAVEL/CONFERENCES MUST BE APPROVED BEFORE ANY TRAVEL ARRANGEMENTS BEGIN**

DATE OF REQUEST:	_____	EMAIL ADDRESS:	_____
EMPLOYEE NAME:	_____	EMPLOYEE NUMBER:	_____
POSITION/TITLE:	_____	SCHOOL/DEPARTMENT:	_____
CONFERENCE NAME:	_____		
CONFERENCE DATES:		DESTINATION CITY:	_____
FROM - DATE/TIME:	_____		
TO - DATE/TIME:	_____	ACCOUNT NUMBER:	_____
			PROGRAM-FUNCTION-LOCATION-OBJECT
TRAVEL DATES/TIMES:		2ND ACCOUNT NUMBER:	_____
FROM - DATE/TIME:	_____	IF NECESSARY	PROGRAM-FUNCTION-LOCATION-OBJECT
TO - DATE/TIME:	_____		
		PRINCIPAL/PROGRAM MANAGER SIGNATURE	DATE

EMPLOYEE SIGNATURE	DATE	CABINET APPROVAL REQUIRED	DATE
I AGREE TO USE THESE FUNDS AS APPROVED, OR REFUND THEM TO THE DISTRICT WITHIN TEN DAYS OF TRAVEL CANCELLATION			

AIRFARE:	\$ _____ + \$25.00 SERVICE FEE FOR USING STATE TRAVEL	\$ _____
<small>*AIRFARE REIMBURSEMENT TO EMPLOYEE WILL ONLY OCCUR UNDER SPECIAL CIRCUMSTANCES - SEE TRAVEL PROCEDURES FOR EXPLANATION.</small>	AIRFARE ONLY	TOTAL AIRFARE
	AIRLINE TICKET NUMBER: _____	\$ _____ *

MILEAGE:	_____ # OF MILES X _____ RATE (PAID AT THE CURRENT IRS RATE - SEE TRAVEL PROCEDURES)	
	Verified that Defensive Driver Training has been taken/passed.	\$ _____

REGISTRATION:	PURCHASE ORDER/REQ #: _____ AMOUNT: \$ _____	
<small>*REGISTRATION REIMBURSEMENT TO EMPLOYEE WILL ONLY OCCUR UNDER SPECIAL CIRCUMSTANCES - SEE TRAVEL PROCEDURES FOR EXPLANATION.</small>		\$ _____ *

PER DIEM FOR MEALS:	(see attached form)	\$ _____
	CONFERENCE AGENDA MUST BE PROVIDED.	

LODGING:	TO BE PAID DIRECTLY TO HOTEL BY DISTRICT	\$ _____
<small>*HOTEL REIMBURSEMENT TO EMPLOYEE WILL ONLY OCCUR UNDER SPECIAL CIRCUMSTANCES - SEE TRAVEL PROCEDURES FOR EXPLANATION.</small>	A CREDIT CARD AUTHORIZATION FORM MUST BE PROVIDED	\$ _____ *

GROUND TRANSPORTATION:		
Select One Option Below:	OPTION A (EMPLOYEE INITIALS REQUIRED): _____	Employee will be reimbursed for per diem and \$42.00 for all ground transportation costs. No luggage costs will be included. Employee will receive travel reimbursement BEFORE the trip (when form is completed per guidelines).
	OPTION B (EMPLOYEE INITIALS REQUIRED): _____	Employee will be reimbursed for per diem, ground transportation and luggage costs AFTER completion of trip and final approval of travel form. Receipts for actual ground transportation and luggage costs MUST BE submitted.
		\$ _____

TOTAL EXPENSE REQUEST	\$ _____
------------------------------	----------

REQUEST APPROVED <input type="checkbox"/>	
BY: _____	DATE _____
BUSINESS ADMINISTRATION USE ONLY	
_____	DATE _____
BUSINESS ADMINISTRATOR	