

Paso Robles Joint Unified School District
CONFERENCE ATTENDANCE PROCEDURE

*Please note: Per Ed code all out of state travel must be approved by Board.
Any request over \$2,500.00 per person, \$5000.00 per group, out of state or over water
will go to Cabinet. *Please allow time for processing.*

Attendee - Completes a *Workshop/Training Claim Form*, DO NOT MAKE HOTEL RESERVATIONS YOURSELF. Principal's Secretary, or Title I Coordinator if using Title I funds, will take care of the arrangements. Please attach a printout of suggested hotel reservation, flyer/brochure of conference and a map with mileage. If a substitute is required, be sure to request through AESOP and fill out a *substitute request form* as well (upon principal's approval).



Principal's Secretary - Verifies information on *Workshop/Training Claim Form (including budget code)*, obtains approval from principal. If district transportation is needed, attach a *Trip/Transportation Request*. Forward to appropriate Budget Manager, Coordinator, or Director.



Budget Manager, Director and Chief Officer: - Director's PPA obtains appropriate signatures and sends a copy of the approved claim form to accounting. PPA attaches a *Workshop Evaluation Form* and returns entire packet to Principal's Secretary or Title I Coordinator.



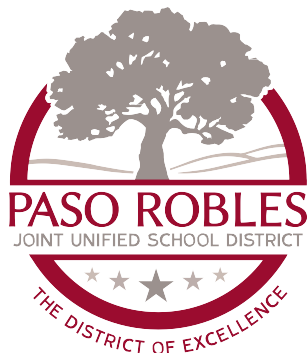
Principal's Secretary/Title I Coordinator - Registers attendee for the conference (if attendee has not yet done so) using site Cal Card or enter a requisition if vendor does not accept credit cards. Make hotel reservations using site Cal Card. Request a "credit card authorization form" from the hotel, fill it out and fax it back to the hotel (attendee will not take site credit card with them). Give entire packet along with conference and hotel reservation information to attendee.



Attendee - Complete section E within 5 days after the conference. You DO NOT need receipts for meals. If you have any other expenses you are requesting reimbursement for, you WILL need to attach itemized, original receipts. Send entire completed packet to appropriate budget manager for final approval.



Budget Manager - Approve final claim and send to CBO for final approval and processing.



Staff Recruitment and Professional Development for Student Success and Student Achievement

Every year, every staff member will be recruited, hired, and retained based upon coherence in knowledge, practice, and beliefs about student learning, instructional best practice, assessment to guide decision-making, and continuous improvement for increased student learning.



PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT

EMPLOYEE TRAVEL EXPENSE REIMBURSEMENT PROGRAM

Board Policy 4133 and AR 4133

Conditions of Travel

Travel and business expenses are to be incurred as a result of conducting official business and are subject to review or verification by the approval authority. Reimbursement shall not be made for meal and lodging expenses incurred within 50 miles of school or work site.

Lodging

The reimbursement rates are for the actual expenses and must be supported by an itemized receipt. Supervisors should encourage travelers to take advantage of applicable discounts. The California Statewide Travel Program www.dgs.ca.gov/travel provides a list of hotels within California that offer government rates.

Meals

Meals that are part of a conference, workshop, or school business are not applicable.

If you leave before 6:00 am	breakfast may be claimed	\$10.00
If you leave before 11:00 am	lunch may be claimed	\$15.00
If you leave before 5:00 pm	dinner may be claimed	\$25.00
If you return after 9:00 am	breakfast may be claimed	\$10.00
If you return after 2:00 pm	lunch may be claimed	\$15.00
If you return after 7:00 pm	dinner may be claimed	\$25.00

Mileage

The current effective mileage rate set by the District using the IRS rate is reimbursable. Employees that receive a monthly mileage allowance can claim mileage outside of the county only.

Rental Cars

Prior approval as noted on the *Workshop/Training Claim Form* is required. The reimbursement rates are for the actual expenses and must be supported by an itemized receipt.

Air Fair

Prior approval as noted on the *Workshop/Training Claim Form* is required. The reimbursement rates are for the actual expenses and must be supported by an itemized receipt.

Documentation Required

Receipts are required for each item of expense, regardless of how the item was paid for. If a receipt is not provided, a written statement signed by the employee must be submitted to obtain reimbursement. The amount not supported by a receipt is subject to being reported to the IRS as income. Receipts are not required for local transit, taxis, shuttles, road tolls and parking charges of \$5.00 or less but must be listed on the conference claim for reimbursement.



PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT WORKSHOP/TRAINING CLAIM FORM

(Must be submitted 15 working days prior to registration deadline)

A. NAME: _____ **DATE OF REQUEST:** _____
ADDRESS: _____ **REGISTRATION DEADLINE:** _____
CITY, STATE ZIP: _____ **POSITION/SITE:** _____

B. WORKSHOP DATE(S): _____ **LOCATION:** _____
WORKSHOP NAME: _____
WORKSHOP REGISTRATION FORM MUST BE COMPLETED & ATTACHED TO THIS FORM

- C.** 1. For substitute coverage, attach Substitute Request (Form #147).
 2. For district transport, attach Transportation Request (Form #106).
 3. Advance allowed only if estimated cost of lodging & commercial transportation exceeds \$50.00.
 4. If you are issued an advance and Section E is not completed after attending the workshop, the advance will be deducted from your paycheck.

D. COMPLETE THIS SECTION PRIOR TO WORKSHOP.

	YES	NO		ESTIMATED COSTS
SUBSTITUTE REQUIRED	<input type="checkbox"/>	<input type="checkbox"/>	REGISTRATION _____	\$ _____
DISTRICT TRANSPORTATION	<input type="checkbox"/>	<input type="checkbox"/>	LODGING _____	\$ _____
PERSONAL MILEAGE	<input type="checkbox"/>	<input type="checkbox"/>	MEALS _____	\$ _____
ADVANCE REQUESTED			MILEAGE: _____ miles @ _____	\$ _____
			OTHER: _____	\$ _____
CHARGE TO				TOTAL \$ _____
Fund	Resource	Yr	Obj	Goal
Func	Site	Disc1	Disc2	

APPROVALS

SUPERVISOR/PRINCIPAL: _____ BUDGET MANAGER: _____ CHIEF OFFICER: _____

E. COMPLETE THIS SECTION AFTER WORKSHOP.

ITEMIZED RECEIPTS MUST BE ATTACHED.

DEPARTURE DATE: _____	REGISTRATION	\$ _____
TIME: _____	LODGING	\$ _____
RETURN DATE: _____	TOTAL MEALS (Itemize below)	\$ _____
TIME: _____	MILEAGE ACTUAL: _____ miles @ _____	\$ _____
	TOTAL OTHER (Itemize below)	\$ _____
CLAIM CERTIFICATION:		TOTAL \$ _____
_____	LESS ADVANCE CHECK:	\$ _____
(YOUR SIGNATURE)	LESS AMT. PAID BY DISTRICT CREDIT CARD:	\$ _____
_____	AMOUNT DUE/OWED:	\$ _____
(BUDGET MANAGER)	(If owed, attach check)	CHECK # _____

ITEMIZED MEAL DATA:

DATE	BREAKFAST \$10	LUNCH \$15	DINNER \$25	TOTAL
TOTAL MEALS (Enter in claim above)				

ALCOHOLIC BEVERAGES ARE NOT REIMBURSED.

OTHER CHARGES (Parking, Public Transport, etc.)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL OTHER (Enter above):	\$ _____

(CLAIM APPROVAL – CHIEF BUSINESS OFFICER)