



LOS ANGELES UNIFIED SCHOOL DISTRICT POLICY BULLETIN

TITLE: District Policy for Travel and Attendance at Conferences or Conventions

NUMBER: BUL-5525.3

ISSUER: Judith Reece,
Interim Chief Procurement Officer
Procurement Services Division

DATE: November 14, 2018

ROUTING
All Employees
All Locations
All Board Members

PURPOSE: The purpose of this bulletin is to inform all employees of guidelines regarding the approval of travel and attendance to conferences, conventions, meetings or trainings.

Administrators may impose more restrictive procedures for additional administrative control or budgetary reasons.

Note: This bulletin does not address travel, conference or convention attendance for students or parents. For student travel, refer to REF-2111.1 Field Trips Handbook and Revised Procedures. For the policy on parent travel, please refer to BUL-6748.0 Parent Conference Attendance. This bulletin replaces BUL- 5525.2 District Policy for Travel and Attendance at Conferences or Conventions, dated July 1, 2014.

**MAJOR
CHANGES:**

- Two travel process overview attachments have been created, Attachment A-School Employee Travel Process Overview and Attachment B-Central Office Employee Travel Process Overview. Travelers should follow the corresponding procedure for their location type.
- For school sites, the Request for Travel and Attendance at a Conference, Convention, or Meeting Form (Form 10.12.1) has been updated. A fillable PDF can be downloaded from the Procurement Travel Desk website: <https://travel.lausd.net>.
- For Central Offices, Form 10.12.1 may be used for informational purposes but will no longer be required to be uploaded. Travel requests and approvals for Central Office employees must be completed electronically via the



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MAJOR CHANGES CONTINUED:

online workflow in SAP. For purposes of this bulletin, “Central Office employees” will also include Board Members and their staff.

- The use of the full-service travel agency is no longer available. Travelers are responsible for selecting the most economical rates when making travel arrangements.
- The SAP Travel Management system provides automated email reminders to prompt timely submittal for reimbursement requests.
- The Travel Expense Claim Form (claim form) and documentation are no longer accepted through fax submission. Email all documentation to: accounts-payable@lausd.net in PDF format.
- Mileage is to be calculated following the guidelines of BUL-6873.0, Business Mileage Reimbursement.

GUIDELINES:

I. PRIOR TO ATTENDING CONFERENCES, CONVENTIONS, MEETINGS OR TRAININGS

A. Purpose of Travel

Employees must ensure all District attendance at conferences, conventions, meetings or trainings is necessary, appropriate and aligned with the Superintendent’s Strategic Goals. Per Board Rules, the attendance must benefit the District through achievement of the following outcomes:

1. Attendance leads directly to the professional or technical growth of the individual and to the improvement of District programs.
2. Attendance is important to the interests and welfare of the District.
3. Attendance leads directly to the improvement of efficiency in the operations of the District.
4. Attendance leads directly to the expansion and improvement of the District resources.

B. Planning

If multiple employees request to attend the same conferences, conventions, meetings or trainings, School or Central Office Administrators must ensure there is no unnecessary duplication of participation by District personnel, per Board Rules. The attendance of employees must not seriously impair the capacity of the District to function effectively. Therefore, absence of an employee due to travel should be minimized to have the least amount of impact on the employee’s work assignment or site business operations. Travel is only allowed one day prior and one day following the event. Employees will be responsible for expenses or any applicable vacation time of additional days beyond those allowed.



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GUIDELINES CONTINUED:

Traveler must obtain documentation of the event (e.g., conference brochure, training flyer, invitation letter, etc.). When a conference is offered in multiple locations, the employee should attend the closest to the work location. For example, if a conference is offered in Anaheim and San Diego, the selected location should be Anaheim.

Selection of trip itinerary and hotel reservations should be cost effective and the most economical option. Hotel expenses are not to exceed \$300 per night, including related taxes and fees. Airline travel should be coach. Upgrades to seats, standby service and priority boarding are not permitted.

Employees are responsible for excess costs and expenses incurred for personal selection or preferences beyond those listed in this bulletin. The traveler runs the risk of not receiving reimbursement if the policies in this bulletin are not followed.

C. Funding Considerations

It is the responsibility of the requesting school or Central Office administrator to ensure appropriate use of funding and that guidelines regarding specially funded programs are followed.

Only appropriate funding lines and allocations are to be used for expenditures related to travel for conferences, conventions, meetings or trainings. Adequate funding in the correct program and general ledger account (GL) of 520002 must be available at the time of entry into the SAP Travel Management system. For schools the entry is completed by the Procurement Services Division (PSD) Travel Desk on behalf of the school. For Central Offices, the SAP entry is completed by the location's designated Site Travel Specialist.

Employees should confirm the spending limit and fund availability for travel with the site fiscal personnel or approving site administrator, prior to submitting a documented request.

D. Obtain Estimates

An estimate of all expected travel expenses must be provided on Form 10.12.1, (for schools) and in the SAP Travel Management system (for Central Offices). For out of state travel include a print-out of the search for hotel/flight estimates, schools attach to Form 10.12.1 and Central Offices upload and attach in SAP. Only allowable expenses as indicated in Attachment C-Allowable Expenses and Reimbursement Documentation will be eligible for reimbursement. All other travel expenses will be the responsibility of the traveler.



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GUIDELINES CONTINUED:

E. Determine Payment Methods

Schools and Central Offices must use appropriate payment methods as authorized by the District. The list of prepaid expense types and acceptable payment methods is provided in Attachment D-Prepaid Expense Types and Payment Methods. For schools and Central Offices without a Travel Card, an Exception Request Form may be submitted to the P-Card Unit to request payment on the P-Card. Pre-approval by the P-Card Unit is required prior to the charge/purchase.

Payment methods are required to be entered on Form 10.12.1 (for schools) and in the SAP Travel Management system (for Central Offices). If the traveler plans to self-pay and request reimbursement, the P-Card/T-Card must not be used.

F. Per Diem

Per diem is an allowance paid to employees to cover expenses for meals incurred when traveling on approved District business. The District allows per diem payments for travel outside of 45 miles from the employee’s work or school site location and a meal (lunch or dinner) is not provided by the event.

Per diem is not allowed for personal extended stays that are not relevant to the District-approved travel to conferences, conventions, meetings or trainings.

TRAVEL/ TRIP INFORMATION	PER DIEM AMOUNT/RATE
Less than 45 miles each way	\$0- No per diem
Over 45 Miles AND	
Leaving before noon, meal is not provided	\$49/Full day
Leaving after noon, meal is not provided	\$24.50/Half day
Returning after noon, meal is not provided	\$49/Full day
Returning before noon, meal is not provided	\$24.50/Half day

G. Timeline

All requirements to request travel approval should be submitted to the approving administrator (for Central Office employees) and to the Travel Desk (for school employees) **at least 20 business days** prior to the event for local and in-state travel, and **at least 30 business days** prior to the event for out-of-state and international travel.

H. Requesting Approval

All employee trip information should be entered and approved in the SAP Travel Management system prior to departure. Employees must obtain prior approval from the appropriate administrator and receive an Approved Travel Request Notification (ATRN) before making any travel arrangements or



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GUIDELINES CONTINUED:

attending conferences, conventions, meetings or trainings, **even when there is expected to be no direct cost to the District.**

School employees should refer to Attachment E-School Employee Travel Requirements for a complete list of required approvals. All required fields on Form 10.12.1 must be completed. A description of the purpose or reason for the travel, along with supporting documentation (e.g., brochure, flyer, a print out of the search for hotel/flight estimates if traveling out of state) must be included with the travel request.

For Central Office employees, Form 10.12.1 is no longer required to be signed and uploaded to SAP but may be utilized for informational purposes. Prior authorization for travel is obtained by SAP entry and workflow approval. For a list of approvals refer to Attachment F-Central Office Employee Travel Requirements. To assist the approving Central Office administrator's evaluation of the travel request, all required fields in the SAP Travel Management system must be completed accurately and supporting documentation uploaded (e.g., brochure, flyer). If traveling out of state, provide estimates for air and hotel; a print-out of the search is required and must be uploaded.

If an approved traveler is unable to attend at the last minute, a substitute traveler may replace the traveler with Site Administrator approval and acceptance of any additional costs or cancellation fees.

The Superintendent may periodically impose a travel freeze as needed. At such time that a freeze is in effect, a Freeze Memo will be provided by the Superintendent's Office with procedures and criteria required to obtain an exemption.

II. AFTER ATTENDANCE AT CONFERENCES, CONVENTIONS, MEETINGS OR TRAININGS

A. After the Trip Documentation

Upon returning the traveler must take steps to ensure that trip can be closed and settled in SAP. The traveler should gather any receipts from self-paid purchases to prepare for reimbursement and should **not** include any District pre-paid expenses paid with P-Card/T-Card, Imprest or Purchase Order (PO).

Schools and Central Offices should ensure that expenses paid with P-Card/T-Card, PO or Imprest are reconciled in SAP appropriately. All travel expenses are to be reconciled to GL-520002 (Travel/ Conference Attendance).



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GUIDELINES CONTINUED:

Any expenses paid with PO must have the goods receipt(s) entered in SAP upon returning from the event. Any P-Card/T-Card transactions are to be reconciled and approved by the 21st of the following month.

Per Board Rule 1503, if the school or Central Office administrator requires it, the traveler should prepare a written or oral report of the event attended.

B. Reimbursement

As stated in Board Rule 1500, “approved reimbursable expenses incurred during attendance at conferences, conventions, and meetings may be reimbursed not exceeding District limits, with proper documentation of such expenses (as authorized in District bulletins).” Thus, District employees are only eligible for reimbursement if they obtain approval prior to travel and self-paid travel expenses. All requests for reimbursements must follow District-approved guidelines and receive authorization from the school or Central Office administrator before processing for payment.

Personal extended stays not relevant to the conference/travel must be removed from the reimbursable total. Also note, personal extended stays are NEVER to be paid with a District T-Card or P-Card.

To request reimbursement school employees must fill out the Travel Expense Claim Form and submit it to Accounts Payable. See [Attachment A-School Employee Travel Process Overview](#).

Central Office employee travelers must ensure the actual and self-paid expenses are entered in the SAP Travel management system. See [Attachment B-Central Office Employee Travel Process Overview](#).

Accounts Payable requires financial proof of payment for each expense, as well as additional documents submitted for reimbursement. Only approved expenditures detailed on the Claim Form will be reimbursed; refer to [Attachment C-Allowable Expenses and Reimbursement Documentation](#). Self-paid expenditures submitted for reimbursement will be reimbursed through the employee’s payroll process.

Incurring expenses and/or traveling without prior approval is against District policy. Any payment or reimbursement requests for a trip that occurred prior to approval will require retroactive travel approval. A Retroactive Travel Request Memo providing written justification for not following the policy must be submitted from the school or Central Office administrator to the PSD Travel Desk Manager for approval. See [Attachment G-Retroactive Travel Request Memo Template](#). This request will be processed as an exception and may delay processing of



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reimbursement. Repeated violations of the Travel Policy may prohibit approval of subsequent Retroactive Travel Requests.

C. **Reminder Email/Notifications**

On the 1st and 16th of every month, the SAP Travel Management system sends an automated e-mail to the traveler if no reimbursement request has been received **and** it is 15 business days or more past the trip end date. Reminder emails will continue to be sent out until appropriate action is taken to close the trip. If no reimbursement request is received within 45 business days after the travel date, the trip request will be closed with zero expense by Accounts Payable. **No reimbursement will be allowed once the trip request is closed in SAP.**

RELATED RESOURCES:

BUL-6748.1, Parent Conference Attendance, August 30, 2018
BUL-6873.0, Business Mileage Reimbursement, July 7, 2017
REF-1706.4, Policy on Use of Imprest Fund, September 15, 2015
REF-2111.1, Field Trips Handbook and Revised Procedures, December 14, 2015
Procurement Manual, 7th Ed., April 2017

AUTHORITY:

This policy bulletin is in accordance with Board Rule 1500 Conference, Convention and Meeting Attendance and Board Rule 1503 Informal Leave of Absence for Attendance at a Conference or Convention.

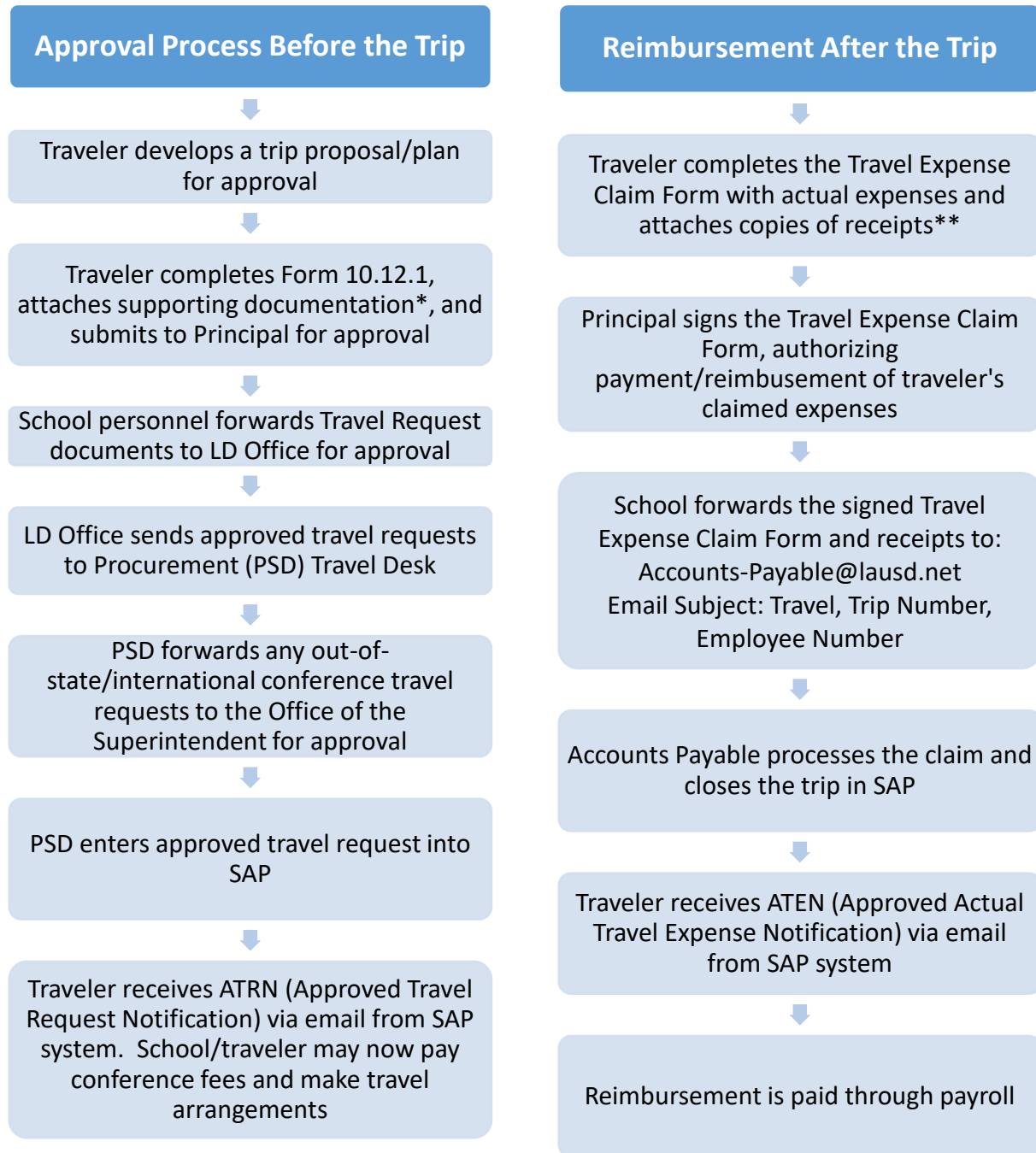
ASSISTANCE:

For assistance or further information, please contact:
Procurement Travel Desk Hotline (562) 654-9058 or e-mail at
Procurement.TravelDesk@lausd.net
District Credit Card Hotline (562) 654-9401
Accounts Payable Customer Service at (213) 241-4800 or e-mail at
Accounts-Payable@lausd.net Payroll Services Branch (213) 241-2570



School Employee Travel Process Overview

ATTACHMENT A

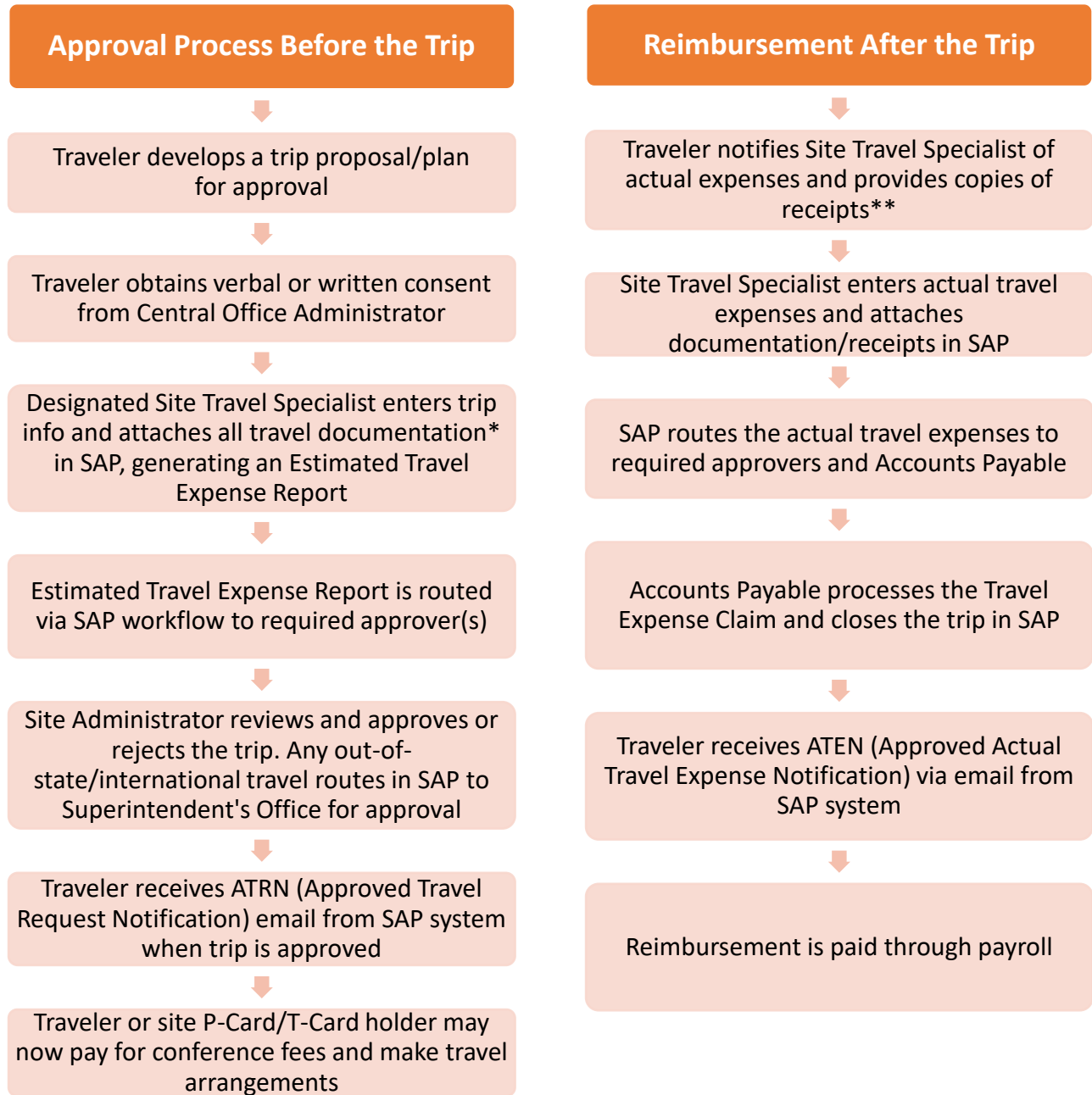


**Attach conference registration form (with date & price), Event Flyer, "Google Map" printout (if claiming mileage), and a print-out of the search for hotel/flight estimates.*
***The Travel Expense Claim Form must be sent to Accounts Payable even if the cost is \$0.*
Note: Confirm SAP reconciliation is complete for expenses paid with P-Card/T-Card, Imprest or PO



Central Office Employee Travel Process Overview

ATTACHMENT B



**Attach conference registration form (with date & price), Event Flyer, "Google Map" printout (if claiming mileage), and a print-out of the search for hotel/flight estimates.*

***The actual expenses must be entered in SAP even if there is no cost to the District (\$0).*

Note: Confirm SAP reconciliation is complete for any expenses paid with P-Card/ T-Card, Imprest or PO



Allowable Expenditures and Reimbursement Documentation

For reimbursement of travel expense claims, Accounts Payable requires receipts/ supporting documents (as indicated below) and proof of payment. Proof of payment is provided by submitting a copy of the traveler's personal credit/debit card statement reflecting the last 4 digits of the card used or bank statement and the traveler's name. Due to privacy issues, employees are advised to conceal their credit card number by redacting CC/DC numbers, except for the last four digits. **Any expenses pre-paid by the District are NOT reimbursable.**

- **Airfare:** Itinerary with traveler's name, dates of travel, amount paid.
- **Baggage Fees:** Baggage Ticket with traveler's name.
- **Conference Fees:** Receipt from the organization with traveler's name.
- **Per Diem:** NO RECEIPTS REQUIRED, PLEASE DO NOT SUBMIT FOOD RECEIPTS. Details on Per Diem allowances are provided in the Per Diem section, Section I.F. on page 4 of this bulletin.
- **Hotel:** Hotel Folio with traveler's name and dates of stay.
- **Parking:** Parking receipt/stub with proof of payment (CC/DC/Bank statement or receipt that indicates "cash" payment). Please note parking expenses are not allowed on the T-Card.
- **Car Rental:** With pre-approval from the school or Central Office administrator, expenses related to a car rental for a Conference/Travel are reimbursable with supporting receipts. Receipts received upon rental returns or CC/DC/Bank statements are acceptable.
- **Gasoline:** Gasoline expenses are reimbursable only if a rental car was used for the travel and pre-approved by Administrator.
- **Taxi/Shuttle/Uber/Lyft:** Receipts required. **TIPS ARE NOT REIMBURSABLE.**
- **Mileage for personal vehicle:** Reimbursement will be based on the shortest route calculated from school/work location using Google Maps. Refer to Bul-6873.0 Business Mileage Reimbursement.
- **Internet:** Internet charges are reimbursable for District recruiters only.
- **Miscellaneous:** Miscellaneous expenses are reimbursable if they are business-related and deemed appropriate and are approved by school or Central Office administrator.



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Prepaid Expense Types and Payment Methods

ATTACHMENT D

PREPAID EXPENSE TYPE	PAYMENT METHOD			
	Self-Paid	T-Card	P-Card	Imprest Check, Shopping Cart
Fees for Conferences, Conventions, Meetings or Trainings	Allowed	Not Allowed	Allowed	Allowed
Airfare	Allowed	Allowed	P-Card Exception may be requested	Not Allowed
Hotel/Lodging	Allowed	Allowed	P-Card Exception may be requested	Not Allowed
Car Rental	Allowed	Allowed	P-Card Exception may be requested	Not Allowed
Taxi/Uber/Lyft	Allowed	Not Allowed	Not Allowed	Not Allowed
Gasoline	Allowed for Rental Cars Only	Not Allowed	Not Allowed	Not Allowed
Tips	Not Allowed	Not Allowed	Not Allowed	Not Allowed

Self-paid

- Permitted self-paid expenses will be reimbursed through the employee’s payroll as a non-taxable reimbursement.
- Gasoline for travel in personal cars, is provided only through mileage reimbursement.

T-Cards

- May be used for **pre-payment** of hotel/lodging. However, travelers are personally responsible for any incidental room charges and must provide their personal credit/debit card at check-in. Incidental room charges are _costs of items and services that are not part of the main bill, such as internet, phone calls and room service.
- _The T-Card is **NEVER** to be used _for incidental room charges including those items for which the “per diem” allowance is intended to cover.

Rental Cars

- Must only be operated by the approved LAUSD traveler.

Note: Exception requests may be sent to the P-Card Unit to request using the P-Card or T-Card for “not allowed” expenses. Exception requests **must** be approved by the P-Card Unit prior to the charge/purchase. Submission of an Exception Request Form does not guarantee approval.



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School Employee Travel Requirements

ATTACHMENT E

School Employee Travel Requirements			
SCHOOL EMPLOYEE TRAVELER	REQUESTING REIMBURSEMENT- DOCUMENTATION NEEDED	NOT REQUESTING REIMBURSEMENT - DOCUMENTATION NEEDED	APPROVAL/SIGNATURES NEEDED BY:
Attending a conference* at a non-District location (in-state)	Form 10.12.1 and SAP ENTRY	Form 10.12.1 and SAP ENTRY	<ul style="list-style-type: none"> ✓ Principal ✓ LD Superintendent or Executive Directors for DACE and ECED employees
Attending a conference* at a non-District location (out-of-state/international)	Form 10.12.1 and SAP ENTRY	Form 10.12.1 and SAP ENTRY	<ul style="list-style-type: none"> ✓ Principal ✓ LD Superintendent or Executive Directors for DACE and ECED employees ✓ Office of the Superintendent
Acting as Chaperone on District Approved Field Trip (in-state)	Form 10.12.1, SAP ENTRY, and follow approval process in Trip Handbook REF-2111.1	No SAP ENTRY, follow approval process in Field Trip Handbook REF-2111.1	<ul style="list-style-type: none"> ✓ Principal ✓ LD Superintendent or Executive Directors for DACE and ECED employees ✓ Division of Risk Management
Acting as Chaperone on District Approved Field Trip (out-of-state/international)	Form 10.12.1, SAP ENTRY, and follow approval process in Trip Handbook REF-2111.1	No SAP ENTRY, follow approval process in Field Trip Handbook REF-2111.1	<ul style="list-style-type: none"> ✓ Principal ✓ LD Superintendent or Executive Directors for DACE and ECED employees ✓ Office of Superintendent ✓ Division of Risk Management



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Central Office Employee Travel Requirements

ATTACHMENT F

Central Office Employee Travel Requirements			
CENTRAL OFFICE EMPLOYEE TRAVELER	REQUESTING REIMBURSEMENT-DOCUMENTATION NEEDED	NOT REQUESTING REIMBURSEMENT-DOCUMENTATION NEEDED	APPROVAL/SIGNATURES NEEDED BY:
Attending a conference at a non-District location (in-state)	SAP entry and approval via workflow	SAP entry and approval via workflow	<ul style="list-style-type: none"> ✓ Site Administrator(s) ✓ Division Head (cost ≥ \$2,000)
Attending a conference at a non-District location (out-of-state/international)	SAP entry and approval via workflow	SAP entry and approval via workflow	<ul style="list-style-type: none"> ✓ Site Administrator(s) ✓ Division Head ✓ Office of Superintendent
Acting as a Chaperone on a District Approved Field Trip (in-state)	Field Trip approval process, and SAP entry and approval via workflow	Field Trip approval process only	<ul style="list-style-type: none"> ✓ Site Administrator(s) ✓ Risk Management
Acting as a Chaperone on a District Approved Field Trip (out-of-state/international)	Field Trip approval process, and SAP entry and approval via workflow	Field Trip approval process only	<ul style="list-style-type: none"> ✓ Site Administrator(s) ✓ Office of Superintendent ✓ Risk Management

Note: When a cost center other than the employee’s is providing funding for the trip, two approvals in SAP will be required; both the site administrator responsible for the employee and the site administrator responsible for the cost center that is paying for the trip. Additionally, any trip costing \$2,000 or more requires the additional approval of the Division Head per the Organizational structure defined in SAP.

