

TITLE: District Policy for Travel and Conference Attendance

NUMBER: BUL-5525.4

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DATE: April 7, 2025

ROUTING
All Employees
All Locations

POLICY: This bulletin provides the updated policy for District-authorized travel. For the purposes of this document:

- “Travel,” “event,” “conference,” and “trip” are used interchangeably to represent all official travel, including, but not limited to, conferences, seminars, meetings, and trainings.
- “Administrator” refers to principals and District office Administrators.
- “Concur” refers to the SAP Concur Travel System used to enter all District employee travel.
- “Worksite” refers to an employee’s work location whether it be a District school or office.

MAJOR CHANGES: This bulletin replaces BUL-5525.3 and is updated as policy changes.

- The SAP Concur Travel System is the system used for entering all employee travel requests. District employees may access the Concur travel module via the [Employee Self-Service](#) website.
- School/Office Administrator approval is required for all travel. Final approval will depend on the type of travel (e.g., local, out of state, etc.).
- Travel freeze approval (when required) will be processed through Concur; additional time and documentation are required when a travel freeze is in effect.
- Airfare and hotel accommodations can be booked in Concur after the travel request is in “Approved” status in Concur.
- Administrators should designate at least one (1) Site Travel Specialist (STS) to assist with entering travel in Concur on behalf of employees and securing funding. The STS should have access to the appropriate cost centers within their worksite. By default, the STS will only have access to employees within the same cost center he/she reports to. Contact the Procurement Travel Desk if additional access is needed. Refer to the “Assistance” section of this bulletin for more information.
- Employees may also enter their own trip request into Concur. For a

step-by-step overview see *Attachment A – Employee Travel Process Overview for more information* or visit the [Travel & Conference](#) section of the [Procurement Services Division \(PSD\)](#) website for other resources such as Job Aids.

- The paper-based travel request and approval (i.e., Form 10.12.1) is no longer required/accepted. The approval process for schools and offices will be based on workflow approval within Concur.
- The maximum hotel rate per night has been increased to \$400/per night.
- Employees may receive reimbursement for tips related to allowable transportation (e.g., Taxi, Uber, Lyft) incurred while on District approved travel for up to 10% of the tippable receipt.
- Travel request submission deadlines have changed. A travel request must be in the Travel Desk’s queue in Concur with all the required documents **at least 30 calendar days** prior to the event for local and in-state travel, and **at least 45 calendar days** prior to the event for out-of-state and international travel.
- Travel expense reports must be submitted in Concur **within 45 days of the trip end date**. After 45 days, open trips will be automatically closed by the Concur system and encumbrances will be released. After the trip is closed, any outstanding reimbursement claim will require submission of a “Retro Expense Report” in Concur (see “Reimbursement” section for more information).
- The District will cover travel expenses for employees traveling directly from their current location (outside Los Angeles) to a District approved travel destination, provided the cost does not exceed the equivalent fare from Los Angeles. If the cost is higher, the employee is responsible for the difference.
- Fieldtrip chaperones are not required to submit a trip request in Concur. However, if reimbursement is required and approved by the administrator, the District employee must submit a “Retro Expense Report” post fieldtrip (see “Reimbursement” section for more information).

PURPOSE:

The purpose of this bulletin is to inform all District employees of the most up-to-date policy for District-authorized travel.

It is at the Administrator’s discretion to impose more restrictive procedures for additional administrative control or budgetary reasons.

NOTE: This bulletin does not address travel for students or parents. For student travel, refer to [REF-2111.1 – Field Trips Handbook & Revised](#)

[Procedures](#). For the policy on parent travel, please refer to [BUL-6748.2 – Parent Conference Attendance](#).

BACKGROUND: This bulletin addresses the changes in the District’s travel process and policy due to the release of Concur in 2024.

GUIDELINES: I. PRIOR TO TRAVEL

A. Strategic Travel

Employees must ensure all District travel to any event is necessary, appropriate, and aligned with the Superintendent’s Strategic Goals. Per Board Rules, the attendance must benefit the District through the 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’s resources.

B. Planning

Per Board Rules, if multiple employees request to travel to the same event, the Administrator must ensure there is no unnecessary duplication of participation by District personnel. The attendance of employees must not seriously impair the capacity of the District to function effectively. Therefore, the absence of an employee due to travel should be minimized to have the least amount of impact on the employee’s work assignment or worksite business operations. Travel is only allowed one day prior and one day following the date of the event. Employees are personally responsible for expenses or any applicable vacation time for additional days beyond those required for District approved travel. District funds may not be used to cover expenses related to personal travel, lodging or food. This includes travel expenses paid for by a third party.

When an event is offered in multiple locations, the employee should attend the one closest to their worksite. For example, if an event is offered in Anaheim and San Diego, the selected location should be Anaheim.

The selection of trip itineraries and hotel reservation should be cost-effective and the most economical option. Hotel expenses must not exceed \$400 per night, including related taxes and fees. The airfare 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 District 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. Adequate funding in the correct program and general ledger (GL) account (520002 Travel/Conference Attendance) must be available at the time of entry into Concur.

Employees should confirm the spending limit and fund availability for travel with their worksite fiscal specialist or approving Administrator, prior to submitting a travel request in Concur.

Further, if travel is being paid for by a third party, which may include vendors, non-profit 501(c)(3)'s or educational institutions, please contact the Ethics Office prior to submitting a documented request. Email requests for assistance may be submitted to AskEthics@lausd.net with all details available related to the travel payment [e.g., name and title of employee(s) traveling, purpose of travel, source of funding, travel expenses covered, date(s) and location of travel, employee participation during travel engagement (speaker, presenter, etc.)]. The Ethics Office will require five (5) business days to complete the review.

D. Estimates and Supporting Documentation

To submit a travel request in Concur, provide an estimate of all expected travel expenses. For travel mileage using a personal car, attach a Google Map print out showing the distance from the traveler's worksite to the event location (see [BUL-6873.0 – Business Mileage Reimbursement](#) for more information). For meetings, an

email invitation will suffice. Only allowable expenses as indicated in *Attachment B – Allowable Expenditures and Reimbursement Documentation* will be eligible for reimbursement. All other travel expenses will be the responsibility of the traveler.

For schools/offices using Title I funds (7S046, 7T691), supporting documentation must include a copy of the school's approved School Plan for Student Achievement (SPSA) pages. These pages should list the conference and show the budget aligned to staff conference travel.

E. Determine Payment Methods

Schools and District 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 C – Prepaid Expense Types and Payment Methods*.

Payment methods or “Payment Type” are required to be entered in Concur. If the traveler selects “self-paid” and request reimbursement, a District credit card may not be used.

F. Per Diem

Per diem is an allowance paid to employees to cover expenses for meals incurred while on District approved travel. The District allows per diem payments if the travel location is 30 miles or more from an employee’s worksite and lunch or dinner is not provided at the event. Per diem is not allowed for personal extended stays that are not part of the District approved travel.

TRAVEL/TRIP INFORMATION FROM WORKSITE	PER DIEM AMOUNT/RATE
Less than 30 miles each way	\$0/no per diem
30 miles or more each way AND...	
leaving before noon, meal is not provided	\$90/full day
leaving after noon, meal is not provided	\$45/half day
returning after noon, meal is not provided	\$90/full day
returning before noon, meal is not provided	\$45/half day

G. Timeline

A travel request must be in the Travel Desk's queue in Concur with all the required documents **at least 30 calendar days** prior to the event for local and in-state travel, and **at least 45 calendar days** prior to the event for out-of-state and international travel. Travel requests with missing or incorrect information will be rejected and the approval workflow will be reset. Travel requests that are not submitted within the timelines will not have sufficient time to be approved and will be rejected. If the travel freeze is in place, travel requests will include an extended submission timeline.

H. Requesting Approval

Travel requests must be in "Approved" status in Concur before making any travel arrangements/purchases. An employee's trip information should be entered into and approved in Concur prior to the event.

I. Combined Business and Personal Travel

Employees attending a District approved conference may elect to extend their trip to include a personal leg of travel prior or after the official travel subject to the items outlined below. The District assumes no liability or responsibility for personal travel.

1. Prior to booking, an employee must obtain approval via the process provided herein.
2. Employees are personally responsible for expenses or any applicable vacation time for additional days beyond those required for District approved travel. Airfare reimbursement is capped at the cost of a round-trip flight between Los Angeles and the business travel location. Any additional expenses are the employee's responsibility. A comparative roundtrip airfare quote is required.
3. Any personal travel must not interfere with the business purpose related to the conference or meeting.

II. AFTER TRAVEL/AFTER ATTENDING AN EVENT**A. After the Trip**

Upon returning from an event/trip, the traveler must take steps to ensure that the trip can be closed and settled in Concur. The traveler should gather any receipts from "self-paid" purchases and District pre-paid expenses paid with a District credit card, Imprest or Purchase Order (PO) and upload them to Concur. Proof of

attendance must be included along with all receipts (e.g., PowerPoint presentation, Sign-in with traveler's name, ID badge, Confirmation email).

Schools and District offices should ensure that expenses paid with a District credit card, Imprest or Purchase Order (PO) are reconciled in SAP appropriately. All travel expenses are to be reconciled to GL account 520002 Travel/Conference Attendance.

Travel accommodation booked in Concur (airfare and hotel) will be paid for with the virtual card. After the trip takes place, the STS or Traveler will have to submit an expense report to reconcile the purchases in the travel request and to reimburse the traveler.

Any travel cost paid with a PO must have a goods receipt entered in SAP upon returning from the event. Any District credit card transaction must be reconciled with a receipt and travel request approval by the 21st of the following month.

Per Board Rule 1503, if the school or District 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)." This means District employees are only eligible for reimbursement if they obtain approval prior to travel for "self-paid" travel expenses. All requests for reimbursements must follow District-approved guidelines and receive authorization from the Administrator before processing payment.

Approved travel requests must be closed by creating an expense report in Concur. Travel expense reports must be submitted in Concur **within 45 days of the trip end date**. After 45 days, open trips will be automatically closed by the Concur system and encumbrances will be released. When closed, any outstanding reimbursement claim will require submission of a "Retro Expense Report" in Concur along with all pertinent receipts/attachments.

Only approved expenditures detailed on the expense report in Concur will be reimbursed; refer to *Attachment B – Allowable*

Expenditures and Reimbursement Documentation. “Self-paid” expenditures submitted for reimbursement in Concur will be reimbursed through the employee’s payroll process.

Traveling and incurring expenses without prior approval in Concur is against District policy. Any payment or reimbursement request for a trip that occurred prior to trip approval will require retroactive travel approval. To request retroactive travel approval, you must submit *Attachment D – Retroactive Travel Request Memo* to Procurement.Traveldes@lausd.net. This request will be processed as an exception and may delay the reimbursement process. Approval is NOT guaranteed, and repeated violations of the travel policy may prohibit approval of subsequent travel requests.

NOTE: District employees chaperoning fieldtrips are not required to submit trip requests in Concur prior to a fieldtrip; approval is through [iFieldtrip](#). If reimbursement is required and the administrator pre-approved reimbursement, you may submit a “Retro Expense Report” in Concur along with the [iFieldtrip](#) approval, and applicable receipts/attachments. The “Retro Expense Report” must be clearly identified in the *Report Name* (e.g., “Fieldtrip Reimbursement – California Science Center” or Fieldtrip Reimbursement – Museum of Tolerance) and the *Trip Activity Type* (i.e., Fieldtrip – Chaperone). For fieldtrip inquiries, contact the Office of Risk Management (see “Assistance” section for contact information).

C. Reminder Email/Notifications

The Concur system will send email notifications to the STS and the traveler as a reminder to complete the pending tasks every seven (7) days until the trip is closed.

AUTHORITY:

This is a policy enacted by the Procurement Services Division in its authority for centralized management of District procurement and in accordance with [Board Rule 1500 Conferences, Conventions and Meetings Attendance](#) and [Board Rule 1503 Informal Leave of Absence for Attendance at a Conference or Convention](#).

RELATED RESOURCES:

- [REF-2111.1 – Field Trips Handbook & Revised Procedures, December 14, 2015](#)
- [BUL-6748.2 – Parent Conference Attendance, May 24, 2021](#)
- [BUL-6873.0 – Business Mileage Reimbursement, July 7, 2017](#)
- [REF-1706.4 – Imprest Funds, September 15, 2015](#)

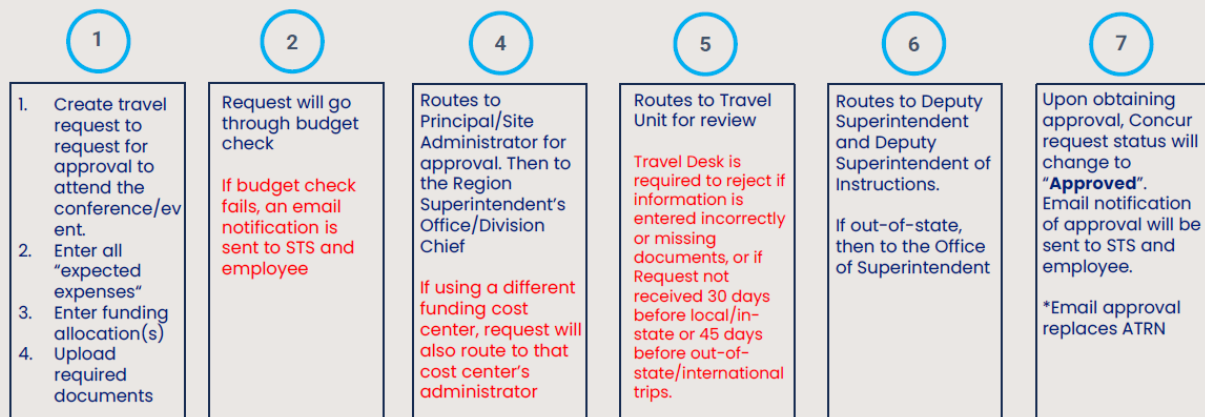
ATTACHMENTS: Attachment A – Employee Travel Process Overview
Attachment B – Allowable Expenditures and Reimbursement Documentation
Attachment C – Prepaid Expense Types and Payment Methods
Attachment D – Retroactive Travel Request Memo Template

ASSISTANCE: For assistance or further information, please contact the appropriate department/unit:

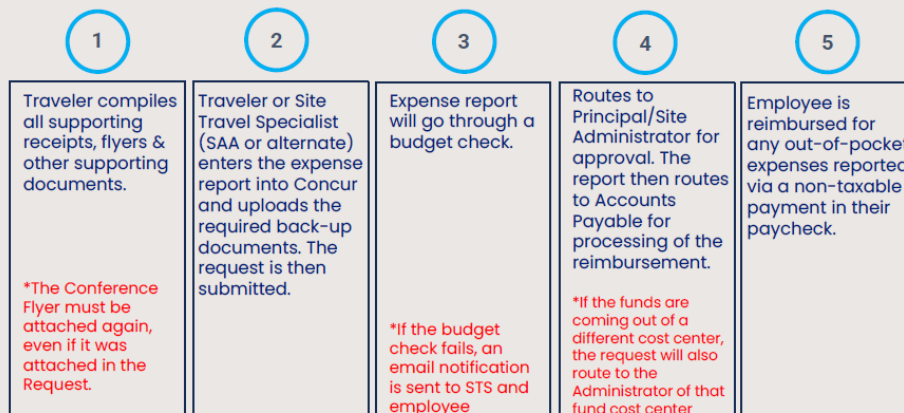
- Procurement Travel Desk Unit
(562) 654-9058 or e-mail at Procurement.Traveldesks@lausd.net
- Procurement Credit Card Unit
(562) 654-9401 or for specific points of contact visit:
www.lausd.org/Page/19809
- Accounts Payable Customer Service
(213) 241-4800 or e-mail at Accounts-Payable@lausd.net
- Payroll Customer Service
(213) 241-2570 or e-mail at PayrollSupport@lausd.net
- Office of Risk Management
(213) 241-0329 or e-mail at ifieldtrip@lausd.net

Employee Travel Process Overview

Step-by-Step Overview for Travel Requests



Step-by-Step Overview for Expense Reports



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 valid receipt for the travel expense. **Expenses pre-paid by the District are NOT reimbursable. Contact Accounts Payable for reimbursement questions.**

- Airfare:** Itinerary with traveler's name, dates of travel, amount paid.
- Baggage Fees:** Baggage receipt with traveler's name.
- Conference Fees:** Receipt from the organization with traveler's name.
- Per Diem:** NO RECEIPTS REQUIRED; DO NOT SUBMIT FOOD RECEIPTS. Details on Per Diem allowances are provided in the Per Diem section, Section I. F. of this bulletin.
- Hotel:** Hotel Folio with traveler's name and dates of stay.
- Parking:** Parking receipt/stub with proof of payment. Note, parking expenses are not allowed on District credit cards.
- Car Rental:** With pre-approval from the Administrator, expenses related to a car rental for travel are reimbursable with supporting receipts. Receipts received upon rental return are acceptable.
- Gasoline:** Gasoline expenses are reimbursable only if a rental car was approved by the Administrator prior to travel.
- Taxi/Shuttle/Uber/Lyft:** Receipts required.
- Gratuity:** Tips are reimbursable, up to 10% of the tippable receipt.
- 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 all employees.
- Miscellaneous:** Miscellaneous travel expenses are reimbursable if they are business-related, deemed appropriate, and are approved by the Administrator.

Prepaid Expense Types and Payment Methods

PREPAID EXPENSE TYPE	PAYMENT METHOD			
	Self-Paid	Concur Booking	P-Card	Imprest Check, Shopping Cart
Fees for Conferences, Seminars, Meetings, Trainings, etc.	Allowed	Not Allowed	Allowed	Allowed
Airfare	Allowed	Allowed	Allowed	Not Allowed
Hotel/Lodging	Allowed	Allowed	Allowed	Not Allowed
Car Rental	Allowed	Not Allowed	Not Allowed	Not Allowed
Taxi/Uber/Lyft	Allowed	Not Allowed	Not Allowed	Not Allowed
Gasoline (For Rental Cars Only)	Allowed	Not Allowed	Not Allowed	Not Allowed
Tips for Transportation	Allowed	Not Allowed	Not Allowed	Not Allowed

Rental Cars

- Must only be operated by the approved LAUSD traveler.
Note: An [Exception Request](#) may be submitted to the Credit Card Unit to request use of the P-Card.

Self-paid

- Permitted self-paid expenses will be reimbursed through the employee’s payroll as a non-taxable reimbursement.
- Gasoline for travel in a personal car is provided only through mileage reimbursement using "Personal Car Mileage" expense type with "Travel Mileage" selected in Concur.

P-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 the cost of items and services that are not part of the main bill, such as phone calls and room service.
- The P-Card is NEVER to be used for incidental room charges including those items for which the “per diem” allowance is intended to cover.

Retroactive Travel Request Memo Template

INTEROFFICE CORRESPONDENCE
Los Angeles Unified School District
Enter School / Office Name

TO: Name DATE: Month XX, 20XX
Travel Desk Manager

FROM: Name
School/District Office Administrator Title

SUBJECT: RETROACTIVE TRAVEL REQUEST MEMO

1. State the information (i.e., start and end date of travel, name of event, amount, etc.).
2. Explain what caused the need for the Retroactive Travel Request.
3. Indicate the corrective action that will be taken to avoid future retroactive travel requests.

If you have any questions, please call insert your name, title, and phone number.

Approved by:

School/District Office Administrator Signature

Date

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Retroactive Travel, Conference or Convention Claims are against District Policy and will only be processed as exceptions and may delay processing of your reimbursement request. Approval is not guaranteed. All retroactive requests must be accompanied by a signed written justification memo from the school or office administrator.