

TRAVEL PLANNING AND REIMBURSEMENTS

Purpose:

To provide guidance to Councilmembers for adherence to the state rules and regulations for travel and expense planning and reimbursements

Authority/Reference:

Welfare & Institutions Code §4550
State Administrative Manual (SAM)
California Department of Human Resources

Applies To:

Council, Committee, and SSAN members

POLICY

Policy Statement

The State Council on Developmental Disabilities (SCDD) shall reimburse councilmembers for any actual and necessary expenses incurred in connection with the performance of their duties (Welfare & Institutions Code §4550). Reimbursement rates are limited to those allowed by state rules and regulations such as those contained in the Government Code, California Department of Human Resources regulations, and the California State Administrative Manual.

Procedures

Travel Requests

Council, Committee, and SSAN members who are required to travel on state business (“travelers”) are responsible for submitting all travel requests, via email, to the Travel Coordinator. All travel questions and requests are to be submitted to travelclaims@scdd.ca.gov. Travel requests are to be submitted no less than 14 days prior to the date of the meeting and must contain the following information.

- Three (3) flight/train options in order of preference. The Travel Coordinator will make every attempt to accommodate the traveler's first preference whenever possible. However, should the first preference be unavailable, the Travel Coordinator will book either the second or third preference.
- Name as it appears on your California I.D., date of birth, Southwest Rapids Rewards and, TSA number (if applicable).

The Travel Coordinator will book travel at least 5 business days prior to meeting or event requiring travel. Upon completion of the reservation, an email confirmation will be sent to the traveler as well as any SCDD staff (when appropriate).

“Wanna Get Away” Fares and Flight Change Requests

SCDD is required to use “Wanna Get Away” fares whenever possible. These fares are non-refundable and costly to change. Therefore, flight change requests are limited to emergency situations only (e.g. illness, injury, or other serious and urgent personal matters) . In non-emergency situations, the traveler will be responsible for making changes and for any fees and fare difference associated with flight change requests.

Hotel Reservations

Council members typically arrive and depart on the same day of the Council meeting. If it is not reasonable for the traveler to arrive on the day of the meeting, a traveler residing outside a 50 mile radius of Sacramento may request hotel accommodations. Travelers that meet this requirement may request a room for one (1) night prior to meeting date. Hotel room requests must be submitted to the Travel Coordinator at TravelClaims@scdd.ca.gov at least 7 days prior to travel. Any Travelers requesting a room for more than one (1) night must submit their request in writing prior to the meeting. Written requests should include the following information: 1) meeting location, date, and time; 2) nature of request (e.g. “Additional Hotel Stay”); and 3) reason for additional night's stay. If you require a reasonable accommodation such as a roll-in shower, adjoining room, etc., please include that information in your request.

Room Cancellations

It is the responsibility of the traveler to notify the Travel Coordinator at least 24 hours in advance if you need to cancel your reservation. Should you need to cancel your reservation after regular business hours, it is the traveler's responsibility to contact the hotel directly to cancel, get a confirmation number for the cancellation, and follow-up with an email informing the Travel Coordinator. Failure to do so, will result in the following actions:

- 1st Occurrence – Traveler will receive a written warning via email.
- 2nd Occurrence – Traveler will receive a formal warning letter from SCDD, and will be responsible for any charges incurred due to the cancellation.
- 3rd Occurrence – Traveler will lose SCDD travel booking privileges for 6 months, and will be responsible for reserving their own hotel rooms and seeking reimbursement after the fact. In addition, the traveler will be responsible for any charges incurred due to the cancellation.

Transportation

Reimbursement for transportation expenses will only be for the method of transportation that is in the best interest of the state considering both direct expense and the traveler's time. When a traveler chooses a method of transportation that is not considered to be in the best interest of the state (i.e. driving a personal vehicle instead of flying or taking a taxi rather than sharing an Uber/Lyft when possible), whatever is most cost effective per individual location/needs, reimbursement will be at the rate of the least expensive option.

Airport Parking

Parking at the airport must be in the best interest of the State. (i.e. parking in long-term lot versus parking in short-term or daily lots). Parking will be reimbursed at the economy lot rate.

Third Party Flight and Lodging Vendors

Expedia.com, Travelocity.com, etc., shall not be used. All reservations must be made through the SCDD Travel Coordinator.

Meals and Incidentals

Reimbursements for each 24-hour period are made using the rates listed below. The time base for which meal reimbursements are based is also listed in the below table.

Reimbursement Rates and Time Frames

<i>Meal</i>	<i>Trip Begins</i>	<i>Trip Ends</i>	<i>Reimbursement Rate</i>
Breakfast	at or before 6 am	at or after 8 am	\$7.00
Lunch	at or before 11 am	at or after 2 pm	\$11.00
Dinner	at or before 5 pm	at or after 7 pm	\$23.00

Exception: Council members attending a full day meeting will receive lunch reimbursement.

The State does not reimburse for tips (taxi, shuttle, meal, etc.) However, travelers will receive a \$5.00 reimbursement for incidentals for each 24-hours of travel to be used for such items.

Rental Vehicles

Rental cars are generally not used and only authorized on a case by case basis. They require prior approval from the Executive Director or his designee. Rental cars must be booked through SCDD's Travel Coordinator. SCDD contracted base rate per day is \$33.00. Anything exceeding that amount will be at the expense of the traveler. Rental cars must be returned refueled. Only the traveler whose name is on the car rental may claim reimbursement for refueling. Refueling charges/fees from the contracted Rental Car company will not be reimbursed. Travelers who operate vehicles on official state business must have a valid driver's license, insurance, and a good driving record.

Mileage Reimbursement Rates

Travelers may seek reimbursement for mileages when using their personal vehicle to conduct Council business. Effective January 1, 2018, mileage reimbursement rates are \$0.545 per mile. A traveler requesting to use her

or his own vehicle must obtain prior approval through the Travel Coordinator to allow for approval to be obtained from the Executive Director and submit a completed Authorization to Use Privately-Owned Vehicle form, STD. 261 before travel.

Submitting Reimbursements

- All travelers shall submit their Travel Expense Claim (TEC) forms and supporting documents no later than 30 days after travel. Incomplete travel claim packages will not be processed. Due to fiscal restrictions, SCDD may be unable to process any travel claims that are received after 30 days.
- Travelers shall complete and submit a TEC form for each trip. It is the responsibility of the traveler to complete all relevant information on this form. Trip start and end times are required. Meal reimbursements are based on the time you leave your home and the time you return home.
- With the exception of meal receipts, travelers shall attach all other original receipts to the Travel Expense Reimbursement form.
- Receipts that are not on 8 ½ by 11 paper (standard paper size) must be taped, not stapled, to an 8 ½ by 11 inch piece of paper.
- TECs that are incomplete will be returned so be sure to complete all information on your form, including your vehicle license plate number (if requesting mileage) and transportation receipts, including bus and rental cars.
- Travel reimbursement checks are issued by the State Controller's Office approximately 6-8 weeks from the date the Travel Coordinator received the travelers TEC. Please plan accordingly.

Helpful Hints

Keep all receipts in an envelope until your claim is filed. **Original receipts** must be submitted with your travel claim. You are responsible for ensuring that all required receipts are included with your TEC and turned into SCDD's Travel Coordinator. All travel and business expenses are to be incurred as a result of conducting state business and are subject to review/verification by SCDD. Be sure your claim form is complete and submitted on time with all required documents attached to your TEC.

Accessibility

It is the policy of SCDD to make a reasonable accommodation for any known physical and mental limitations of an otherwise qualified traveler performing duties on behalf of the SCDD, unless making that accommodation would create an undue hardship. If you require a reasonable accommodation to complete travel claim forms and/or prepare supporting documentation, you may contact the Travel Coordinator at (916) 263-7919. It is recommended that requests for accommodation are submitted in advance allowing enough time to meet any deadlines.

Most Recent Action

February 12, 2019: Executive Committee approved policy.