



EMPLOYEE/FACULTY TRAVEL GUIDELINES

Out of District Travel:	Requires prior approval of Department Manager
Out of State Travel:	Requires prior approval of the President
Foreign Travel:	Requires prior approval of the Governing Board
Faculty Members:	Arrangements for class coverage is required. Dismissing students to accommodate travel is not permitted. Class may be rescheduled for a specific date.

IMPORTANT COVID-19 (coronavirus) Update:

VIRTUAL CONFERENCE ATTENDANCE AND REGISTRATION

Virtual Conferencing Event Registration. These Guidelines Pertain to VIRTUAL REGISTRATION Only.

(While COVID-19 Social Distancing Travel Restrictions are in Effect)

- Event Registration for employees/faculty must be done outside of Concur. For students, please refer to [Field Trips](#).
- Use Object Code **55200** for **all** travel.
- No Travel Authorization is required; however, your supervisor may require one be completed.
- Upon approval, registration should be made by the departmental assistant or attendee if you are able to do so without making payment. If payment is required at the time of registration, please see below.
- Event registration that may be paid by check requires a [Check Request](#) form, (unless the vendor specifically excludes payment by check).
- Indicate in notes "Virtual Event". After preparing the check request, attach:
 - A copy of the budget financing the travel and,
 - A copy of the signed Travel Authorization,
 - If no Travel Authorization, document in notes "Virtual event, No TA"
 - Submit Check Request form and the supporting documentation via Adobe Sign for signature to:
 - Travelers supervisor (signature required)
 - Budget manager (signature, if necessary)
 - Karen Martinez (cc only)
- When payment cannot be made by check, and event registration requires payment by credit card, prepare a [Credit Card Request Form](#) and indicate in notes "Virtual Event".
- Indicate in notes "Virtual Event". After preparing the check request, attach:
 - A copy of the budget financing the travel
 - A copy of the signed Travel Authorization,
 - If no Travel Authorization, document in notes "Virtual event, No TA"
 - All other supporting documentation.
 - Submit Credit Card Request form and supporting documentation via Adobe Sign for signature to:
 - Travelers supervisor (signature required)
 - Budget manager (signature, if necessary)
 - Lucy Trafton (cc only)
 - Once document has been signed, contact Lucy Trafton (755-6737) to coordinate the use of the credit card for event registration.



EMPLOYEE/FACULTY TRAVEL GUIDELINES

HARTNELL COLLEGE Travel Guidelines

Plan Ahead

30-45 Days Prior to Travel:

- Hartnell College employees/faculty may **not** book and/or **pay** for their own travel and seek reimbursement.
- **Please note: For ALL student travel, please refer to [Field Trips](#). These guidelines DO NOT apply to students. If HCCD vans are needed, please contact Lourdes at the Alisal campus regarding the use of HCCD vans.**
- Travel arrangements should be made for the traveler by the support staff within the traveler's own department using Concur. Proof of sufficient funds within the budget should be included in the supporting documentation attached to the Travel Authorization. Please include the page for object code 55200 and not the entire budget.
- When funding for travel is provided by a department or program outside of the traveler's own department, proof of sufficient funds must be provided to the traveler's department in the supporting documentation attached to the Travel Authorization. Travel is to be booked by the support staff within the traveler's own department, not the department funding the travel.
- When entering the GL or GL's funding the travel, always use Object Code **55200** for **all** travel.
- When travel expenses must be booked prior to the end of the current Fiscal Year, but the actual travel will occur in the upcoming FY, only registration may be paid from the current FY. Actual travel expenses/reimbursements **must** be paid from the FY budget in effect at the time of the actual travel.
- Complete a [Traveler Data Profile](#) form & submit to Julie Silveira in the Business Office to create a Concur user profile.
- Verify in advance that you have driving clearance on file. All Hartnell business travel by personal car **requires [Driving Clearance in advance of the travel date](#)**. To verify your driving clearance status, contact Julia Silveira at 755-6800.
- Complete a **Travel Authorization Form**. Be sure to use the current year's form which may be found on our [Travel webpage](#). (The year of the form can be verified by the date in **red** in the "Personal Vehicle" box under "Estimated Costs"). A [Travel Authorization Form](#) must be completed for each travel event, even when the travel is at no cost to the college as the form acts as your request & authorization to be off-campus to attend the event. Attach supporting documentation following:
 - The page indicating Object Code **55200** from the budget financing the travel, (not the entire budget),
 - The event registration cost and including an agenda or schedule,
 - A Google Map/Driving Directions for any mileage being claimed,
 - All transportation costs, including:
 - Mileage claimed for personal car, and/or
 - Rental car (Estimate gasoline reimbursement in "Other Expenses and Tips"), and/or
 - Airfare, and/or
 - Monterey Airbus, Uber, Lyft (Include cost in "Other Expenses and Tips").
 - Lodging costs of the venue. If estimating costs be sure to include resort fees and taxes in your estimation.
 - Meal Allowance (See **IRS Per Diem [link](#)** on the top of the Travel Authorization Form).
 - Other Anticipated Expenses – This includes but is not limited to Wi-Fi/Business center fees, hotel parking, tolls, Uber/taxi use, shuttle, ferry, bus fare, Monterey Airbus, and gasoline reimbursement for rental cars. All receipts **must** be itemized. **Please Note: Airport parking costs are not an authorized expense.**
- Submit the complete Travel Authorization packet with all supporting documents **via Adobe Sign** for signature to: **Traveler** (signature), **Traveler's supervisor** (signature), **Budget manager** (signature, if applicable), **Vice President** (Signature, if applicable), **President/Superintendent** (Signature, **out of state only**), and please include Julie Silveira and Lucy Trafton (**cc only**).
- **Please note, our calculating PDF forms** (such as our Travel Authorization and Mileage Reimbursement form) **are updated at the beginning of each calendar year or as advised by the IRS, to calculate the new IRS mileage rate and meal per diem reimbursement rate**. Outdated, incomplete, or improperly completed forms will be returned and delay processing.
- All reimbursements for out of pocket travel expenses will be mailed to the home address Human Resources has on file. Verify in advance that your home address on file is current. To request an address change, please complete an [Address/Name Change Form](#) and submit to **Human Resources**. Human Resources may be reached at 770-6103.



EMPLOYEE/FACULTY TRAVEL GUIDELINES

Driving Clearance

Personal Vehicle

- Employees/faculty must seek driving clearance **in advance of driving** on behalf of the District as per our [Mileage Reimbursement Guidelines](#) to be eligible to request mileage reimbursement. **Please note:** Clearance sought after the fact may not be reimbursable.
- **Students and student workers are not eligible to drive for the District.**
- Driving clearance is processed by the Business Office. It must be sought in advance of driving on behalf of the District and can take up to 3 business days to receive DMV clearance.
- It is the responsibility of the traveler to confirm they have clearance on file with the Business Office prior to their event and to provide the documentation required to receive clearance.
- Driving clearance for personal vehicles requires submission of:
 - A copy of your valid **California** driver's license,
 - **Interim California Driver's Licenses are valid for 60 days only** from the date of issue and **must** be replaced by submitting a copy of the permanent driver's license within those 60 days to maintain clearance,
 - Clearance through the DMV must be submitted on an annual basis by the Business Office. And,
 - Proof of liability insurance coverage. Proof of insurance must be maintained as current and must contain any one of the following statements indicating that you carry the state of California's minimum liability insurance requirements:
 - This policy meets the applicable California financial responsibility laws, or
 - This policy complies with CVC Section 16056 or 16500.5 of the California Vehicle Code, or
 - Coverage provided by the policy meets the minimum liability limits prescribed by law.
 - To maintain your driving clearance after receiving it, proof of insurance is generally required to be resubmitted on a more frequent basis, however each policy is unique in how long or how short the period of coverage is. Each time you renew your policy, please be sure to provide your updated proof of insurance indicating your new effective dates of coverage to Julia Silveira in the Business Office. For example, if your proof of insurance on July 1, 2022 and its date of expiration is the following week on July 8, 2022, you only have driving clearance in effect through July 8, 2022, and you would need to provide updated proof of insurance to the Business Office to maintain your driving clearance *after* July 8, 2022.
- Rental Vehicles are preferred as they provide a significant cost savings to the District as opposed to mileage reimbursement, however, all requests to use a personal vehicle will be considered. In special circumstances such as, but not limited to, ADA requirements or traveling short roundtrip distances which do not include airport parking, mileage reimbursement for a personal vehicle may be equal to or less than car rental and receive approval. In those qualifying circumstances the employee may use the vehicle of their choice, personal or rental, subject to Mileage Reimbursement Guidelines and driving clearance. To verify if your event qualifies for use of your personal vehicle, please contact Julie Silveira or Lucy Trafton in the Business Office for assistance.
- **Mileage Reimbursement:** Is calculated and reimbursed at the current years IRS mileage. Do not round up or down, list exact mileage.
 - Attach a Google Map indicating the mileage from your Hartnell campus to your final destination. Mileage is calculated to and from the traveler's **HARTNELL COLLEGE** campus address, not their home address. (Some exceptions apply).
 - If traveling strictly between campuses and you are authorized to receive mileage for traveling between campuses, please refer to our [One-Way Campus to Campus Document](#). All mileage listed here does not require Google Map documentation.
 - Reimbursement may be requested using either the [mileage reimbursement form](#) for mileage reimbursement alone which is to be submitted on a monthly basis, no later than the 10th of the following the month in which the mileage was incurred, or when associated with travel, included on the Travel Expense Claim Form, provided to you or your Travel Assistant, once your Travel Authorization has been processed.



EMPLOYEE/FACULTY TRAVEL GUIDELINES

Rental Vehicle

- Enterprise is the contracted car rental agent for HARTNELL COLLEGE and are preferred as they provide a significant cost savings to the District.
- Driving clearance for rented vehicles requires DMV clearance on file in the Business Office and can take up to 3 business days to receive DMV clearance.
- It is the responsibility of the traveler to confirm they have clearance on file with the Business Office prior to their event and if needed, to provide the necessary documentation to receive clearance.
- Enterprise requires advance notice of at least 7-10 business days for the following situations, call well in advance when:
 - Renting a van/s from Enterprise Salinas to confirm the size van/s you wish to rent is/are available. If not in stock, they will try to locate one, this takes time.
 - Renting a vehicle at one Enterprise location and returning it to another Enterprise location.
- **Mileage Reimbursement:** Rental vehicles are not eligible for mileage reimbursement; the cost of gasoline will be reimbursed with original receipts when submitted with a Travel Expense Claim Form. Attach all itemized receipts, please mount all small receipts to an 8.5" x 11" paper and tape all sides down securely.
- **Students and student workers are not eligible.**

Hartnell Gas Cards

- A Hartnell gas card may only be used when driving:
 - A Hartnell owned vehicle,
 - A rented vehicle such as the vans rented for athletic team transport,
 - A rented vehicle to attend an authorized off-campus event.
- After using a Hartnell gas card, the gas card/s and all gas receipts should be turned in to Angie Jacobo (ajacobo@hartnell.edu) in maintenance as soon as possible upon your return.
- A Hartnell gas card is **not** authorized for use by/with:
 - A student,
 - A privately-owned vehicle.
- Mileage Reimbursement Guidelines remain the same and may be found in the [Driving Clearance Policy](#).

Event Registration (In-Person Events)

- Event registration must be done outside of Concur.
- Event registration is to be paid via check request unless the vendor specifically excludes payment by check.
- Include the following documentation with the check request:
 - A copy of the budget financing the travel,
 - A copy of the event agenda or schedule.
- Submit the completed [Check Request](#) form and all supporting documentation via Adobe Sign for signature to:
 - Traveler's supervisor (signature),
 - Budget Manager (if applicable, signature),
 - Karen Martinez (cc only).
- When making payment by credit card, submit a completed [Credit Card Request Form](#) and all supporting documentation via Adobe Sign for signature to:



EMPLOYEE/FACULTY TRAVEL GUIDELINES

- Travelers supervisor (signature),
 - Budget manager (if necessary, signature),
 - Lucy Trafton (cc only).
 - Once the document has been completely signed, Contact Lucy Trafton to coordinate the use of the credit card for event registration. Please note the credit card may only be used within the Business Office and only when a check request will not be accepted.
- Outdated, incomplete or improperly completed forms will be returned and delay processing.

Airfare

- All employees requesting airfare should review current [CDC Guidelines/Requirements for Domestic Travel](#).
- All airfare must be booked through Concur.
- For employee safety, all flights should be booked as Nonstop.
- For best results, book airfare when you have easy access to communicate with the traveler/s to allow the traveler/s to provide input on flight departure/arrival times etc.
- When booking airfare, select Economy refundable tickets or Basic Economy non-refundable tickets. Before purchasing please review all links provided indicating what is/is not included in the cost of the ticket.
- Special Services or Requests provided at additional cost/s to the District are **not covered and include:**
 - **Excess baggage fees** (See Baggage below) and,
 - **Upgraded Seating** (See Seating below).
- All Airfare should be booked out of a local airport; however, some exceptions may apply. The airports considered to be local airports are:
 - San Jose, CA - Norman Y. Mineta International Airport (Call Letters SJC),
 - San Francisco, CA - San Francisco International Airport (Call Letters SFO),
 - Monterey, CA - Monterey Regional Airport (Call Letters MRY).

Baggage

Southwest Airlines (the preferred airline of HARTNELL COLLEGE), includes the cost of one bag in the ticket price. If unsure of what is or is not included in the cost of a ticket, review all links provided indicating what is/is not included in the cost of the ticket you are viewing, before selecting it for purchase.

Baggage Reimbursement: When booking a flight on an airline which charges separately for baggage, Hartnell will reimburse the cost of 1 bag for up to 4 days of travel and the cost of 2 bags for travel of 5 days or greater.

Upgraded Seating

All airfare booked within Concur assumes economy seating. Upgraded or preferred seating may not be booked within Concur. Preferred seating must be requested by and paid out pocket by the traveler. Preferred seating reimbursement must be **requested in advance of traveling** and will be determined in the Business Office on a case by case basis. If requesting to upgrade seating be sure to provide all relevant documentation (such as a doctor's note stating medical necessity) to assist in the determination.

Mileage Incurred When Traveling to Nearby International and Regional Airports

All travel to and from the airport should be ideally determined via cost comparisons to determine the greatest savings to the District. Roundtrip transportation provided by Monterey Airbus, Uber, or Lyft should be utilized if available and lower in cost than mileage reimbursement.

Airport Parking

Airport Parking is not a covered expense and will not be reimbursed.



EMPLOYEE/FACULTY TRAVEL GUIDELINES

Lodging

(When the Event/Venue Provides a Reduced Room Rate, Book Room/s **Outside** of Concur)

- Contact the hotel using the phone number of the property, (not the chain's national reservations number).
 - Verify room availability for the travel dates.
 - If rooms are available ask if they can hold the room without a credit card pending receipt of the credit card authorization form.
 - If yes,
 - Book the room pending receipt of the credit card authorization,
 - Ask for the total cost including fees and taxes,
 - Ask them to send you the credit card authorization form,
 - Move on to Prepare a credit card request form below.
 - If no,
 - Obtain as accurate an estimate of cost as you can, including taxes and fees for the length of time the traveler will be there. Use this estimate in preparing your credit card request form.
- Prepare a credit card request form. Attach the following:
 - Documentation which may include the event email invitation, schedule, or agenda,
 - A copy of the budget funding the travel,
 - A copy of the signed Travel Authorization,
 - Supporting documentation for the lodging.
- Submit your completed credit card request packet (the form and all supporting documentation) via Adobe Sign for signature to:
 - Traveler's supervisor (signature)
 - Budget manager (signature, if applicable)
 - Lucy Trafton and Julia Silveira (cc only)
- Upon approval of the credit card request:
 - Contact the Business Office to schedule a time to use the credit card. The credit card may only be used within the Business Office.
 - Book the room and after booking, ask them to email you a **Credit Card Authorization** if not previously received.
 - ➡ It is the responsibility of the person booking travel to ensure receipt of the credit card authorization for the traveler and to **follow up until received**.
 - ➡ **Failure to complete this step will result in the traveler paying out of pocket for the cost of the hotel.**
 - ➡ Once the credit card authorization is received, forward it to Lucy Trafton and Julia Silveira to process for direct payment.
 - ➡ If the credit card authorization is not received immediately after booking, follow-up with the hotel until received. (If not received by the end of the day, notify Lucy Trafton and Julia Silveira in the Business Office and provide them with the hotel's phone number).

Lodging

(When the Event/Venue Does **Not** Provide a Reduced Room Rate Book Room/s **in** Concur)

- When lodging is NOT included with the event, book lodging through Concur when possible.
- Select the hotel closest to the event if the hotel hosting the event is fully booked.
- Select at least a ★★ hotel.
- After booking lodging in Concur, the room has been reserved but **not** secured on a credit card. To secure payment for your travelers, locate the hotel phone number, (**not** the chain's national reservations number), to call and ask them to email you a **Credit Card Authorization**. (Make note of the confirmation number. The front desk staff may ask you for this when you call them).



EMPLOYEE/FACULTY TRAVEL GUIDELINES

- ➡ It is the responsibility of the person booking travel to ensure receipt of the credit card authorization for the traveler and to **follow up until received**.
- ➡ **Failure to complete this step will result in the traveler paying out of pocket for the cost of the hotel.**
- ➡ Once the credit card authorization is received, forward it to Lucy Trafton and Julia Silveira to process for direct payment.
- ➡ If the credit card authorization is not received immediately after booking, you must follow-up with the hotel until received. (If not received by the end of the day, notify Lucy Trafton and Julia Silveira in the Business Office, provide them with the hotel's phone number).
- Prepare a credit card request form and attach all supporting documentation:
 - Documentation may include the event schedule indicating the hosting hotel.
- Prepare a credit card request form. Attach the following:
 - A copy of the budget funding the travel,
 - A copy of the signed Travel Authorization,
 - Supporting documentation for the lodging.
- Submit your completed credit card request packet (the form and all supporting documentation) via Adobe Sign for signature to:
 - Traveler's supervisor (signature)
 - Budget manager (signature, if applicable)
 - Lucy Trafton and Julia Silveira (cc only)
- Upon approval of the credit card request:
 - Contact the Business Office to schedule a time to use the credit card. The credit card may only be used within the Business Office.
 - Book the room and after booking, ask them to email you a **Credit Card Authorization** if not previously received.
 - ➡ It is the responsibility of the person booking travel to ensure receipt of the credit card authorization for the traveler and to **follow up until received**.
 - ➡ **Failure to complete this step will result in the traveler paying out of pocket for the cost of the hotel.**
 - ➡ Once the credit card authorization is received, forward it to Lucy Trafton and Julia Silveira to process for direct payment.
 - ➡ If the credit card authorization is not received immediately after booking, follow-up with the hotel until received. (If not received by the end of the day, notify Lucy Trafton and Julia Silveira in the Business Office and provide them with the hotel's phone number).

Meals

- **Original, itemized receipts are required.**
- Special Dietary Requirements:
 - If there are special dietary or vegetarian concerns, please confirm in advance with the venue if special dietary menu choices are made available to attendees.
 - If not available to attendees, special dietary or vegetarian meals are reimbursable and subject to guidelines.
- If purchasing a meal for a fellow conference attendee, indicate the name of the attendee next to the meal purchased and indicate their relation to the college.
- Only reasonable and customary tips/gratuities will be reimbursed.
- Please note, there is a lower reimbursement rate for meals on the first and last day of travel per GSA guidelines.
- A meal will not be reimbursed if an employee:
 - Elected to purchase a meal in lieu of a meal included in the registration fee,
 - Elected to purchase a hot breakfast in lieu of a Continental-type when provided,
 - Elected to purchase a meal/s for someone **not attending** the event. Non-reimbursable meal/s should be placed on a separate check.
- Alcoholic beverages will not be reimbursed.



EMPLOYEE/FACULTY TRAVEL GUIDELINES

Other Expenses

- Original, itemized receipts are required for **all** other expenses including transportation, street cars, ferry, trolley, taxi, bus fare, bridge toll, gas, and hotel parking. Please note, as indicated above in Airfare, **airport parking is not reimbursable.**

Documentation Required for Reimbursement

- Complete the **Travel Expense Claim Form** when submitting for reimbursement of all out of pocket expenses.
- Attach all itemized receipts, mounting small receipts securely to an 8.5" x 11" paper and taping all corners.
- **Reimbursement of out of pocket expenses is not guaranteed for travel not authorized in advance** (Travel Authorization not submitted/approved in advance of travel).
- **HARTNELL COLLEGE** Employee/Faculty travel reimbursement guidelines solely apply to college employees/faculty. **For student travel, please refer to [Field Trips](#).**
- **Note:** No changes may be made to the authorized amounts or dates of travel listed on the Travel Authorization form after obtaining authorization (signatures).
- If dates of travel change and/or any of the financial details need to be amended, approval is required.
- Reimbursements are made for reasonable expenses UP TO the authorized estimated total amount only. If expenses exceed the estimate, approval must be obtained as noted on the Travel Expense Claim Form.
- Submit your Travel Expense Claim Form packet (the form and all supporting documentation) via Adobe Sign for signature to:
 - Traveler (signature),
 - Traveler's supervisor (signature),
 - Budget manager (signature, if applicable),
 - Grants manager (if applicable), and
 - Lucy Trafton (cc only).