



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.

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IMPORTANT COVID-19 (coronavirus) Update:

Virtual Conferencing Attendance and Registration During COVID-19 Social Distancing Travel Restrictions:

Virtual Conferencing Event Registration (While COVID-19 Social Distancing Travel Restrictions are in Effect)

- No Travel Authorization is required; however, your supervisor may require prior approval to attend.
- 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). After preparing the check request:
 - Attach any and all supporting event and registration documentation to the Check Request form.
 - Submit the completed and signed check request form along with any supporting documentation to Karen Martinez via email (accountspayable@hartnell.edu).
- When payment cannot be made by check, and event registration requires payment by credit card, prepare a [Credit Card Request](#) form. After preparing the credit card request form:
 - Attach any and all supporting event and registration documentation to the Credit Card Request form.
 - Submit the completed and signed Credit Card Request form along with any supporting documentation to Lucy Trafton (mtrafton@hartnell.edu) or Julia Silveira (jsilveira@hartnell.edu) in the Business Office (E-108) to coordinate the use of the credit card for event registration. ~~Once authorized:~~
- Event registration must be done outside of Concur.

Unrestricted Travel Page 2 of 7 (Post COVID-19 Social Distancing Travel Restrictions)

Documentation Required for Authorization Prior to travel:

30-45 days prior to travel:

- Complete a [Traveler Data Profile](#) form and submit to Julie Silveira (755-6800) in the Business Office (E-108) to create a Concur user profile within CalTravel, the HARTNELLCOLLEGE travel program and software.
- Verify you have driving clearance. All Hartnell business travel by car **requires** obtaining driving clearance.
- Complete a **Travel Authorization Form**. A [Travel Authorization Form](#) must be completed for all travel even when the travel is at no cost to the college, as it is your request & authorization to be off-campus to attend the event.
- Travel arrangements are to be made and paid for by the college and not the traveler. Attach cost estimates for each travel modality and copies of all supporting documentation. Estimates *must be all inclusive* as they constitute the *limit of your authorized expenditures*. Your documentation should include but is not limited to:
 - Event registration, date/s, agenda, schedule,
 - Google Maps/Driving Directions for any mileage being claimed,
 - Lodging,
 - Meal Allowance (See **Per Diem** link on Travel Authorization Form)
 - Other Anticipated Expenses – This includes parking, tolls, Uber/taxi charges, shuttle fees, ferry, bus fare.
- Submit your original completed Travel Authorization packet to the Business Office. Keep a copy for your records. Once processed and assigned a Travel Authorization number, you will receive via email a Travel Expense Claim Form.
- No changes are to be made to the Travel Authorization form after obtaining authorization (signatures). If dates of travel change or any of the financial details need to be amended, approval is required.
- If a Travel Expense Claim Form is not received shortly after submitting, you may wish to contact the Business Office to verify it was received. You will need the assigned authorization number in order to book travel in Concur.
- Once your expense claim form is received, notify your support staff that they may now book travel for you.
- Upon your return, be sure to request & submit itemized receipts for all out of pocket expenses to submit upon return for reimbursement.

Documentation Required for Reimbursement:

- Upon your return, complete the **Travel Expense Claim Form** and list all out of pocket expenses.
- Attach all receipts, including pre-paid (i.e., conference registration) and all out of pocket receipts received while traveling. Mount small receipts by taping them to an 8.5" x 11" paper.
- Obtain all authorized signature/s and submit to Lucy Trafton in the Business Office within five (5) days.
- Reimbursements are made for reasonable expenses *UP TO* the authorized estimated total amount only. If expenses exceed the estimate, special approval must be obtained as noted on the Travel Expense Claim Form
- Accounts Payable will notify you via email when your reimbursement will be available for pick up in the Cashier's Office (Building B, Mon. – Thurs. 8:30 – 4:30, Fridays 9:00 – 1:00, 831-755-6998).

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Driving Clearance

Personal Vehicle:

- To be eligible to use your personal vehicle for travel you must verify you have driving clearance on file in the Business Office. To verify clearance, contact Julie Silveira for assistance.
- It is your responsibility to verify you have driving clearance on file in the Business Office *prior* to the event. It can take up to 2 business days to receive DMV clearance.
- Driving clearance for personal vehicles requires:
 - A copy of your valid California driver's license to receive clearance from the DMV and,
 - Proof of insurance.
- Use of personal vehicles is discouraged as rental vehicles provide a significant cost savings to the District. In special circumstances such as, but not limited to, ADA requirements or traveling a short roundtrip distances that does 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 (755-6737) in the Business Office for assistance.

Driving Clearance

Rental Vehicle:

- To be eligible to rent a car you must verify you have driving clearance on file in the Business Office. To verify clearance, contact Julie Silveira in the Business Office for assistance.
- It is your responsibility to verify you have driving clearance on file in the Business Office *prior* to the event. It can take up to 2 business days to receive DMV clearance.
- Driving clearance for a rental vehicle requires:
 - A copy of your valid California driver's license to receive clearance from the DMV.
- The preferred car rental company of HARTNELLCOLLEGE is **Enterprise** as Hartnell has entered into the State of California's Enterprise contract providing additional benefits and cost savings to the District.
- If renting a van/s from one of the two Salinas Enterprise locations, you should call first to confirm the size van/s you wish to rent is/are available.
- Enterprise locations in Salinas are:
 - 280 Mortensen Avenue, Street, Salinas, CA 93905
 - 1150 Auto Center Circle, Salinas, CA 93907
- Other Monterey County Enterprise locations may be found within Concur or online.

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Mileage Reimbursement

Personal Vehicle:

- CURRENT RATE of reimbursement as of January 1, 2020 is .575¢ per mile. The per mile reimbursement is set according to the current Internal Revenue Service rate and can fluctuate. If bookmarking a Travel Authorization Form, be sure to update your bookmark each year to have a form with the most current rate.
- Mileage is calculated to and from the traveler's HARTNELLCOLLEGE campus address, **not** their home address.
- Mileage reimbursement includes the cost of gas when driving a private vehicle.
- Attach a Google Map indicating mileage from your Hartnell campus to your final destination.
- Submit a completed [mileage reimbursement form](#) for mileage reimbursement alone or include on the Travel Expense claim form if associated with authorized travel.
- Attach a Google Map indicating mileage from your Hartnell campus to your final destination.

Gas Reimbursement

Rental Vehicle:

- There is no *mileage* reimbursement when using a rental vehicle, however gas costs are reimbursable.
- Original, itemized receipts are required for reimbursement of gas purchased for a rental car.
- Mileage reimbursement claims in lieu of itemized gas receipts will not be accepted.

Airfare

- All airfare should be booked through Concur to save costs to the District.
- All Airfare should be booked as Nonstop unless not available.
- Special Services or Requests provided at additional cost/s to the District are not covered.
- All Airfare should be booked out of the local airport providing the greatest savings to the District. Those 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)
 - Monterey Airport may now be selected as a departure airport. When seeking authorization, please provide the Supervisor authorizing the travel (or the Budget Manager if applicable), with a cost comparison of departing from either SJC or SFO and include them in your Travel Authorization packet.

Travel To and From Nearby International and Regional Airports

- All travel to and from the airport should be reviewed via cost comparisons to determine the greatest savings to the District. Roundtrip transportation provided by Monterey Airbus or Uber should be utilized if lower than airport parking costs. Airport parking may be used if found to be at a lower cost to the District than use of the Monterey Airbus or Uber.

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Event Registration

- Event registration should always be paid via check request unless the vendor specifically excludes payment by check.
- Event registration must be done outside of Concur.
- Registration should be made by the travel assistant or by the traveler however, payment for the registration should not be paid by the traveler.
- Registration costs should be listed on the Travel Authorization and paid for via the submission of a [Check Request](#) to Karen Martinez (755-6997) in the Business office (E-108). After preparing the check request:
 - Attach the supporting registration documentation to both the Travel Authorization and Check Request forms.
 - Include a copy of the Check Request for Registration in the Travel Authorization packet.
 - Include a copy of the Check Request for Lodging in the Travel Authorization Packet
 - Include a copy of the Travel Authorization to both the Check Request for Lodging and Check Request for Registration, (they go to separate desks),
- When payment cannot be made by check, prepare a [Credit Card Request](#) form.
 - Attached the supporting documentation to you Credit Card Request form.
 - Include a copy of the form in your Travel Authorization packet, and
 - Include a copy of the Travel Authorization with the Credit Card Request for Registration.
 - Contact Lucy Trafton (755-6737) in the Business Office to schedule a time to use the Controller's credit card.

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

- Prepare a credit card request form. Attach the following:
 - A copy of the Travel Authorization,
 - The supporting documentation for the lodging and,
 - A copy of the budget funding the travel.
- 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, locate the hotel phone number, (**not** the chain's national reservations number). Ask them to email you a **Credit Card Authorization**.
 - It is the responsibility of the person booking travel to ensure receipt of the credit card authorization for the traveler.
 - Follow up until received.
 - ***Failure to complete this step will result in our employee paying out of pocket for the cost of the hotel.***
 - If the credit card authorization is not received immediately after booking, you must follow-up with the hotel until received.
 - If not received within 48 hours notify Julie Silveira or Lucy Trafton in the Business Office.
 - Once received, immediately forward the authorization to Julie Silveira or Lucy Trafton via email.

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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.
- Select the hotel closest to the event.
- Select at least a ★★★★★ hotel.
- After booking lodging in Concur, 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).
 - It is the responsibility of the person booking travel to ensure receipt of the credit card authorization for the traveler.
 - Follow up until received.
 - ***Failure to complete this step will result in the traveler paying out of pocket for the hotel.***
 - If the credit card authorization is not received immediately after booking, you must follow-up with the hotel until received.
 - If not received within 48 hours notify Julie Silveira or Lucy Trafton in the Business Office.
 - Once received immediately forward to Lucy Trafton or Julie Silveira

Meals

- Original, itemized receipts are required.
- Multiple meals purchased on one receipt require: Note with receipt that includes names of those whose meals were purchased, their relation to the college, purpose of the meal, and dollar amount for each meal.
- Alcoholic beverages will not be reimbursed.
- A meal will not be reimbursed if an employee elected to purchase a meal in lieu of a meal included in the registration fee. (Exceptions: Special dietary or vegetarian requirements; breakfasts other than Continental-type.)
- ALL tips or gratuities require an original receipt for reimbursement. Only reasonable and customary tips/gratuities will be reimbursed.



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Other Expenses

- Original, itemized receipts are required for all other expenses including transportation, street cars, ferry, trolley, taxi, bus fare, bridge toll, gas, and parking.

Booking Travel via Concur

- Hartnell College employees may **not** book their own travel and seek reimbursement.
- An approved Travel Authorization is required prior to booking any travel (in Concur or by credit card).
- Once the Travel Expense Claim Form has been returned to the traveler, the traveler should notify their support staff that travel may now be booked.
- Travel should be booked (in Concur or when using the Hartnell credit card) by the support staff in the traveler's department. Support staff are linked in Concur to book travel for their staff.
- When funding for the travel is provided by another department or program, travel is still to be booked by the support staff within the traveler's department, not the department funding the travel.

Use of the Controller's Credit Card

- May only be used within the Business Office, please contact Lucy Trafton to schedule an appointment.
- May only be used when a Credit Card Request form has been specifically approved for payment of:
 - Lodging booked outside of Concur, or

Student/Group Travel

- Student groups/team travel is currently not booked through Concur.
- Please contact Julie Silveira for all upcoming student or group travel.