



KERN COUNTY PROBATION DEPARTMENT

Policies And Procedures

TITLE: Training and Travel Expenses			Article: 1402.01
APPROVED: William Dickinson, Chief Probation Officer			
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TRAVEL AUTHORIZATION

The course of business may require departmental employees to attend training or travel out of town. The Chief Probation Officer or designee can authorize in-and out-of-State travel for employees.

A travel authorization should be completed with appropriate approvals and sent to Accounts Payable prior to the travel date. All passengers will be listed on the Travel Request and any passenger not involved in County business must be approved by the Chief Probation Officer.

The form is located on the "Common" drive at the following link:

<Z:/Common/DeptForm/TravelRequest&Authorization>

STC TRAINING

Any staff completing STC training out of town needs to contact the Training Office at 396-4571. The Training Secretary will complete all necessary steps for the training, including:

- Travel Request & Authorizations
- Travel Advance (if needed)
- Hotel reservations (accommodations).

UNUSUAL TRAVEL

Unusual travel is defined as a trip to a foreign country, a trip where the estimated cost for an individual exceeds \$2,500, where an employee will be absent more than five working days, or other travel the County Administrative Officer determines to be unusual for the normal course of County business.

Unusual travel must be approved by the Board of Supervisors. When requesting Board of Supervisors approval, the Board letter must clearly define the cost, e.g. registration, lodging, transportation and meals.

Probation Department employees complying with orders of the Juvenile Court related to juvenile custody and placement do not require prior Board approval.

COUNTY RESTRICTED TRAVEL FOR OUT OF COUNTY TRAINING & CONFERENCES:

The County has a restricted travel policy for out of County training and conferences. The only exception is travel related for Placement Officers. Therefore, in addition to the "Travel Request & Authorization" form described above, staff must receive approval from the CAO (County Administrative Office) for out of County travel for training and conferences. The Auditor has created a program to enter the travel request, submit it and receive approval.

Procedure:

1. Log into AuditorNet.
2. Hover mouse pointer on "Home" tab, then "FMS Applications", then "Travel", then "CAO Travel Requests" and click.
3. Click link "Create Request".
4. Complete the form in its entirety prior to the travel date and click "Submit" for CAO approval.
5. An auto-response email will be sent to you.
6. Once CAO has approved the Travel Request you will receive an email approval notification.

TRAVEL ADVANCES:

Staff is allowed to ask for a travel advance from the Auditor when traveling on department business. Staff will enter the advance request into the AuditorNet. When filled out, print out the travel advance claim, and then click the submit button.

Sign the travel advance claim, and complete the Travel Request & Authorization form, and submit both to your supervisor.

This process should be done as far in advance as possible; no advance will be accepted less than two (2) weeks prior to the travel date.

A travel claim must be completed on the AuditorNet website after the completion of the related travel within 21 days. If the travel expenses are less than the advance, staff will be required to repay the difference, either by writing a check to the County for the difference or by having the difference deducted from the staff's next biweekly payroll warrant.

REIMBURSABLE STAFF EXPENSES:

When traveling out of town, if you have any questions on hotel accommodations (i.e. finding an economical hotel) you may contact the training secretary at (661) 396-4571 at Training for guidance. Non-STC Staff will be expected to place their own reservation.

Transportation: The most economical and efficient transportation method should be used.

Use of Personal Vehicle

(In County): Staff using personal vehicles for department business in Kern County will be reimbursed for mileage based on the current mileage rate, as shown in County Administrative Bulletin No. 20 (see attached).

(Out of County): Department vehicles are to be utilized for Out of County travel. If staff utilizes their personal vehicle for Out of County travel, there will be no mileage reimbursement.

MILEAGE CLAIMS SHOULD BE SUBMITTED ON A QUARTERLY BASIS.

Mileage reimbursement claims are entered on the AuditorNet website. When all information has been entered, print out the claim, and then click the submit button. Sign the mileage claim and send the claim to your supervisor for approval.

INELIGIBLE REIMBURSEMENT EXPENSES:

All personal expenses, such as barbering, valet services, alcoholic beverages, entertainment, hotel room telephone charges, etc. shall not be reimbursed. Tips are a gratuity and will not be reimbursed.

Valet parking exception:

Per Auditor clarification, the only exception to valet parking is, if the hotel you are staying at has no self-parking. However, there is a stipulation; in order for staff to be reimbursed you must complete the following procedure. When entering the travel claim in the AuditorNet, in the MEMO section of the claim, staff shall state the reason why "valet" parking was used. For example: "No self-parking available", or "No public parking available", or "Public parking not practical because it is too far from the hotel." Under no other conditions will valet parking be permitted for reimbursement.

If this is not included with your submission for reimbursement, Accounts Payable will have no choice but to remove any charges from your claim referring to valet charges, and you will not be reimbursed for those expenses.

OTHER METHODS OF TRAVEL – AIRFARE:

Contact the Placement Office Services Technician (OST) at (661) 396-4545.

The OST assigned to the placement unit handles all reservations for air travel and rental cars. Please contact her with any questions.

RENTAL CARS

All travel that requires a rental car, please contact the OST at (661) 396-4545 in Placement. General guidelines: If you should arrive at the car rental agency, and the associate wants to upgrade the reserved vehicle refuse if there is an additional cost. Under all circumstances return the vehicle back to the rental agency with a full tank of gasoline. Gasoline can be paid for by either using a Voyager card, if one was provided to you by the Department or pay out of pocket. If paying out of pocket, make sure to get a receipt, and include the amount in your Travel Claim for reimbursement.

STC TRAINING:

Any staff completing training needs to contact the training secretary at the Training Office at (661)396-4571. She will complete all necessary steps for your training, including the following:

1. Travel Request & Authorizations
2. CAO Approval Requests
3. Travel Advance (if needed)
4. Hotel reservations (accommodations)

LODGING EXPENSES

The department responsibility is to spend tax payer funds wisely. Therefore, in most areas staff should be able to find nice hotels that do not cost near the maximum lodging rate. All staff should be good fiduciaries of tax dollars.

The maximum reimbursement rate for lodging is adjusted annually and published in County of Kern Administrative Bulletin No. 20. Employees should request the lower government rate. Employees paying cash or using the American Express Travel Card should request waiver of the Transient Occupancy Tax. Expenses exceeding the maximum rate will be reimbursed only if lodging within the rate limitation is not reasonably available and the Chief or Deputy Chief signs the Claim.

MEALS AND INCIDENTAL EXPENSES

Per Diem Meals:

1. The purpose of the per diem is to help defray meal costs to staff that are traveling strictly to perform functions for the department. The maximum daily per diem rate for meals is based on the federal rate for each city jurisdiction. If a meal is included (i.e. lunch) in a seminar or meeting, when submitting a claim, the box should be checked that a meal was provided and showing what meal. The per diem will be adjusted for that provided meal.
2. The Kern County Probation Department incorporates by reference the Kern County Administrative Policies and Procedures Manual, Chapter 3, Section 305 titled Meals and Incidental Expenses. More specifically in regard to proration of meals included in "seminars/meetings/lodging costs, or when the County pays directly for a meal, the per diem amount for that day." This does not apply when the meal provided is a Continental Breakfast. Any Travel Claim requesting an exception based on the inability to partake of the meal provided must be approved in writing by the department head.
3. If a meal is provided by the hotel, staff may seek per diem reimbursement if staff did not partake of the meal. By claiming per diem reimbursement, staff is affirming that they did not partake of the meal. This does not apply when the meal provided is a Continental Breakfast.

The maximum daily per diem rate for meals and incidental expenses is the federal rate for each jurisdiction, which is adjusted annually in October and is posted on the federal General Services Administration web site (www.gsa.gov). Information about any area not listed is available from the Auditor-Controller-County Clerk.

When actual cost is less than the per diem rate, reimbursement will be made for actual expenditures only. No reimbursement is allowed for meal expenses exceeding the allowable per diem, except that expenses incurred during travel outside the Continental United States will be reimbursed at actual cost.

A. Proration for Partial Day and Single Day Out-of-County Travel.

For single day travel and on the first and last day of multiple day travel, the employee will be reimbursed one-fourth of the meal per diem for each quarter of the day he/she is traveling or away from home on County business. The quarters of the day are as follows:

Midnight to 6:00 A.M.
6:00 A.M. to Noon
Noon to 6:00 P.M.
6:00 P.M. to Midnight

B. Proration for Meals Included in Seminars/Meetings.

When the meal cost is included in the registration fee for a seminar or other type of meeting, or when the County pays directly for a meal, the cost of that meal will be deducted from the per diem amount.

When the registration includes a meal, but the cost of the meal is not identifiable, then the cost of that meal will be established at the current per diem rate and deducted from the per diem for that day.

DRESS CODE

Employees are to dress in appropriate attire for STC classes. They shall not wear shorts, tank tops or thong-type sandals to training. When a class is held at another agency, staff will be advised in advance of that agency's dress requirements.

DRIVERS LICENSE / INSURANCE POLICY:

County regulations require all employees who drive a vehicle on County business to have a valid California drivers' license. If an employee drives their own vehicle during the course of County business, regardless of whether or not they claim mileage reimbursement, they are required to have vehicular liability insurance at or above the minimum levels set forth in the County Administrative Code (\$15,000/\$30,000 public liability; \$5,000 property damage).

A Mileage Authorization Form (located on the common drive), copy of the driver's license and insurance certificate (showing coverage levels, term dates, and employee name), must be sent to Accounts Payable. It is each staff's responsibility to make sure, when their driver license or insurance policy is renewed, an updated copy is sent to Accounts Payable.

An expired driver's license or insurance certificate will cause staff to not be reimbursed for travel/mileage expenses. Without renewal copies on file and until the situation has been rectified, staff **should not** drive personal vehicles for any County business. If the employee is unable to provide evidence of a valid license, or is unable to provide insurance coverage, the employee shall be notified in writing that failure to secure a valid driver's license or the appropriate coverage within fifteen (15) days may result in disciplinary action up to and including dismissal.