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SAN BERNARDINO COUNTY | Behavioral Health

Travel Approval and Expense Reimbursement Policy

Effective Date	07/01/1994	Signed by: Joshua Dugas 5A92D5B2822A4C7
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Policy

It is the policy of San Bernardino County Department of Behavioral Health (DBH) to establish guidance for the DBH workforce members for obtaining approval when travel is necessary to conduct official County business and for requesting reimbursement for expenses incurred during travel.

Purpose

To provide instruction to the DBH workforce members for travel approval and expense reimbursement for business conducted within California and out of the State (e.g., CMHDA, Medi-Cal Policy Meetings, Directors Association, etc.) necessary to carry out their job duties.

Definitions

Appointing Authority: The executive or administrative head of a county department, division, or agency.

Memorandum of Understanding (MOU): A document that describes the details of an agreement reached by two or more parties.

County Requirements for Mileage Reimbursement

DBH workforce members claiming reimbursement for private automobile mileage must have a valid California Drivers' License and carry vehicle liability insurance as required by the County of San Bernardino. Volunteers and non-DBH workforce members who qualify for reimbursement will need to have a W-9 form on file with DBH. The County does not provide insurance for private vehicles used on County business. The vehicle owner is responsible for personal liability and property damage insurance.

Note: When renting a vehicle for official County business, workforce members must decline the gas prepay option. Accepting the prepay option requires the workforce member to reimburse the County 50% of the amount charged.

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Reimbursable Expenses

DBH workforce members shall seek to use the lowest rate available for the type of service or accommodation being utilized that meets their needs and minimizes risks including negotiated airline, hotel, and rental car contracts. Exceptions may be made when an Appointing Authority determines that an overriding consideration requires flexibility in order to serve the best interest of the County, or if a lower rate is not reasonably available.

The County will reimburse workforce members for the following expenses when they travel on official County business:

- Mileage (refer to the General MOU for specific information on claiming mileage);
- Meals (refer to the General MOU for allowable amounts);
- Parking fees;
- Ride-Share Service, Taxi, or Public/Mass Transit fees, and
- Toll Charges

Note: Itemized receipts for expenses must be submitted for each item along with the claim for reimbursement. workforce member will be responsible for any charges above the approved allowable amount.

Non-Reimbursable Expenses

The County will not reimburse workforce members for personal expenses including, but not limited to:

- Alcoholic beverages;
- Snacks, gum, or using in-room snack services (mini-bar or fridge);
- Movie or internet charges;
- Inclusion of another person's charges;
- Complimentary services;
- Charges paid for by another person;
- Meals that are in conjunction with a regular day of work;
- Mileage for travel from home (must subtract mileage from home to office when calculating mileage), or
- Valet parking-unless self-parking is not available, or security is a concern.

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Claim Submission

DBH workforce members will follow the guidelines below when submitting a travel claim:

- The **Travel Request and Travel Expense Report (BOP040)** (located on the DBH intranet) must be completed for reimbursement of expenses related to travel on approved County business;
- Travel requests are to be submitted to Fiscal Services:
  - 30 days prior to travel within County;
  - 60 days for travel outside County, and
  - 120 days for travel out of State (out of State travel requires CAO approval);
- Requests for expense reimbursement for routine mileage claims should be prepared for the entire month and submitted at the beginning of the next month using the **Travel Request and Travel Expense Report (BOP040)**.
- Travel expense reports for preapproved travel requests should be submitted within seven (7) working days from the end of travel;
  - Claims older than six (6) months will require an interoffice memo providing explanation as to why the claim was submitted late, and
  - Claims older than 12 months will not be processed.

Related Policy or Procedure

DBH Standard Practice Manual and Departmental Forms:

- Travel Approval and Expense Reimbursement Procedure (BOP3012-1)
- Training Tuition Reimbursement Policy (TRA8006)
- Training Tuition Reimbursement Procedure (TRA8006-1)

DBH Intranet:

- Travel Request and Travel Expense Report (BOP040)

Auditor-Controller SAP Forms:

- Credit Card Justification Statement
- Temporary Credit Card Issuance Record
- Assigned Visa Card - User Agreement Form

Reference(s)

- General Memorandum of Understanding (MOU), Expense Reimbursement Article, Sections 1 through 9