



REGIONAL PARK AND OPEN SPACE DISTRICT

TRAVEL & TRAINING AUTHORIZATION FORM INSTRUCTIONS

The electronic version of this form is programmed to calculate all totals, adjust meal allowances and accommodation maximums for high-cost cities, and notify you if Executive Office approval is required.

You will need to complete all areas of the form that are highlighted in **yellow**:

- ✓ In the **Employee** section, fill in your Name, Division, Position Title, Phone Number and who your direct Supervisor is.

- ✓ In the **Training/Conference** section, fill out the name of the Training or Conference event, the Location of the event, the Event Date(s) and membership ID number (If applicable to the event you are going to).
 - Use the drop-down box to select the state the training/conference is located in. The default selection is "California"; if you select a different state, a notification that Executive Office approval is required will be displayed on the form.
 - Use the "City Type" drop-down box to select whether the destination city is considered "Standard" or "High Cost". You can refer to [...] for a current list of cities the Board of Supervisors considers to be "high cost".
 - Enter the cost for the training/conference. If this amount is greater than \$500, a notification that Executive Office approval is required will be displayed on the form.

- ✓ In the **Budget** section, the first drop down box asks you to select if your travel/ training trip is included in the budget for the fiscal year during which the travel/training will take place. Use the drop-down box to select "yes", "no", or "pending". Once you receive budget approval, you can fill in the accounting string information of Fund, Department ID, and Class (if applicable).

- ✓ The **Travel Arrangements** section has three parts: Air Travel, Accommodations, and Transportation.
 - If air travel is required, fill in the following flight information:
 - Airport Code for Departure, Arrival, and Return flights.
 - Dates of departure, arrival, and return.
 - Flight times.
 - Cost for departure and return flights.
 - Baggage fees for departure and return flights.

- If accommodations are required, fill in your check-in and departure dates.
 - Provide cost information for two (2) hotel choices and list them accordingly along with the cost per night at each hotel.
 - **NOTE:** *If the nightly rate is greater than \$159 for a Standard city or \$239 for a High Cost city, the words “OVER LIMIT” will display on the form and the total will not be calculated. In this case, you will need to select accommodations with nightly rates that do not exceed the maximum allowable amount.*
 - After you enter two accommodation options, the least expensive option will be selected in calculating your total costs.
 - In the transportation section, fill in information for rental vehicles (if required), ground transportation costs such as taxi or shuttle, estimated personal mileage reimbursement, and any other transportation-related costs.
 - For rental vehicles, be sure to include:
 - The date you will pick up the vehicle,
 - The daily vehicle rental rate,
 - And the vehicle return date.
 - The grand total for all travel costs (air travel, accommodations, and transportation), will automatically be calculated.
- ✓ The **Meals** section will automatically display the proper pre-diem amount for each meal (breakfast, lunch, and dinner) based on whether you selected a Standard or High Cost city. Fill in the number of times you will eat each type of meal during your travels, and the totals will be calculated automatically.
- ✓ The **Grand Total Estimated Costs**, which includes the Event Fee, Grand Total Travel Costs, and Total Meals Costs, will calculate automatically. If this amount is over \$1,000, a notification that Executive Office approval is required will be displayed on the form.

When all the information has been inputted, print the form and sign in the approvals section at the bottom. Your supervisor also needs to sign, as does a manager.

For the Executive Office approval section, the words “Not Required” will display on the signature line if your request is not out-of-state and does not exceed certain dollar amounts. However, if Executive Office approval is required, the signature line will be blank and the form will need to be forwarded for their final approval.