

<b>Contract Requirements</b>	<b>Travel Reimbursement and Approval</b>
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**PURPOSE**

Provide information on travel reimbursement and transportation guidelines and the training and conference approval criteria for WIC local Agencies.

**POLICY**

The WIC local agency contract, Exhibit B, Provision 5 states that any reimbursement for necessary travel and per diem shall be at the reimbursement rates currently in effect as established by the California Department of Human Resources (CalHR) Travel Reimbursements guidelines located at:  
<http://www.calhr.ca.gov/employees/Pages/travel-reimbursements.aspx>.

In-state travel, including training and conference events, **does not require** CDPH/WIC Division pre-approval. In-state excess lodging expenses **require** pre-approval and the approval process is in Section III.e. below.

Out-of-state travel **requires** CDPH/WIC Division pre-approval and the approval process is in Section V. below.

Prior approvals are **required** for presentation materials at any event, in-state or out-of-state, when a WIC Local Agency employee is conducting a presentation on behalf of the contract and the approval process is in Section I. below.

**REQUIRED PROCEDURE**

**I. Presentation Approval**

Prior approvals are required for presentation materials at any event, in-state or out-of-state, when a WIC Local Agency employee is conducting a presentation on behalf of the contract. This does not apply to necessary staff meetings or training sessions held for the WIC local agency staff to conduct routine business matters. Refer to the contract, Exhibit D(F).

The request for approval must be submitted to the Nutrition Consultant, in writing, on local agency letterhead, and must be signed by the WIC Director. The request for presentation approval must be received at least five (5) weeks prior to the proposed presentation date. It must include a detailed description of the presentation, including the topic and data being shared, and any materials that will be shared.

**II. Reimbursement Criteria and Rates**

A local agency employee may be reimbursed for their travel expenses when travel is to conduct official WIC business. WIC local agency staff must use the safest and most economical means of travel and lodging possible. Destination events must be directly related to conducting official WIC business.

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The reimbursement criteria and rates (such as per diem, lodging, and personal vehicle mile reimbursement) are available on the CalHR website at:  
<http://www.calhr.ca.gov/employees/Pages/travel-reimbursements.aspx>.

**III. Allowable Business Expenses**

- a. **Communication:** Telephone calls, fax charges, and telecommunication charges made to conduct official WIC business are allowable costs. Documentation is required for reimbursement and must include the date, party called, reason for the call, and proof of payment (hotel invoice, telephone bill, etc.).
- b. **Parking:** Parking fees are reimbursable. A receipt is required when the expense for any one continuous parking fee exceeds \$10. Parking at the airport should be limited to “long-term” (lowest cost) parking at all times. Parking reimbursement is not an allowance; only actual expenses are reimbursable.
- c. **Registration:** Registration fees for attending conferences or training are allowable costs. Expenses for lodging and meals not provided at the conference or training are allowable costs. If the registration fee to attend the conference or training includes meals or lodging, those expenses may not be reimbursed as a separate travel expense. A copy of the conference or training brochure must be included with the documentation maintained at the local agency.
- d. **Lodging – Shared Rooms:** When employees share lodging expenses, each employee must claim one half the room rate charged. Both employees must submit a copy of the receipt and both employees must note the name of the other employee. If two employees are sharing a room and the divided costs are not in excess of the maximum county commercial rates, then State WIC Program approval is not required.
- e. **Lodging – Excess Lodging Approval:** Individual lodging expenses in excess of the maximum county commercial rate requires State WIC Program approval prior to the proposed travel. Local agencies must submit the Excess Lodging Rate Request / Approval form and justification to their State WIC Program Contract Manager. The form is located at:  
<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std255C.pdf>
- f. **Extended Trips for Personal Convenience:** If a local agency employee extends a business trip for personal reason, only the expenses relating to the WIC business may be claimed.

**IV. Transportation Guidelines**

The least costly and most reasonable mode of transportation must be used. When a more costly method of transportation is chosen, justification must be kept on file at the local agency and retained for audit purposes. Transportation modes consist of commercial airlines, taxi, bus, shuttle, train, subway or automobile.

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If a local agency employee uses a personal vehicle in lieu of air transportation, the maximum amount reimbursed shall be either the coach/economy fare or the mileage rate, whichever is less. Allowable charges include personal vehicle mileage, parking fees, and bridge and road tolls.

If a trip begins or ends at home, the mileage reimbursed should be the shorter distance between home and the destination or the WIC local agency location and the destination.

**V. Out-of-state Travel**

Out-of-state travel requires written approval from the CDPH/WIC Division at least 30 days prior to the proposed travel.

WIC local agency employees traveling out-of-state to attend a training or conference must complete and submit a WIC Local Agency Out-of-state Travel Request form (PPM 1000-09-A1) to the CDPH/WIC Division Contract Manager for approval at least 30 days prior to the event.

Upon approval, actual lodging expenses will be reimbursed and require a receipt; however, due diligence must be made to secure reasonable and economical rates. Meals and travel expenses will be reimbursed based on the rates identified in this chapter. Travel documents and expense documentation must be kept on file for CDPH/WIC Division review.

**AUTHORITY**

WIC local agency Agreement, Exhibit A, Scope of Work, Provision 6.A.8)  
WIC local agency Agreement, Exhibit B, Provision 5.

**CROSS-REFERENCE**

PPM 1000-09-A1 WIC Local Agency Out-of-State Travel Request