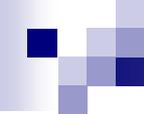


# Travel Guidelines for Committee Members January 2015



**Norma Pate, Manager  
Commission and  
Administrative Support  
Unit**



# Purpose

- The Mental Health Services Oversight and Accountability Commission (MHSOAC) Travel Guidelines for Committee Members is a reference tool to be used to:
  - Determine the documents needed; and
  - Proper reimbursement rates for travel expenses incurred by committee members.

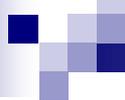


# General Rules

- Committee members will be reimbursed in accordance with State per diem laws.
- For State per diem laws, committee members are considered non-salaried consultants and, as such, must follow the MHSOAC Travel Guidelines set forth by the MHSOAC, Executive Director.

# General Rules (cont'd)

- All travel arrangements for committee members must be made by the MHSOAC Travel Coordinator. The MHSOAC Travel Coordinator will ensure that each reservation is made in accordance with the State per diem laws.
- It is the responsibility of the committee member to be familiar with and to adhere to all applicable travel rules and regulations and to submit reimbursement claims within 30 days of travel with all receipts.



# Required Forms

- **Payee Data Record Form STD. 204**
- **Travel Profile Form**
- **Travel Expense Claim Worksheet**
- **Travel Expense Claim (TEC)**
- **Authorization to Use Privately Owned Vehicles on State Business**



Travel Profile for \_\_\_\_\_

<b>Personal Information</b>	Name as it appears on drivers license	
	E-mail address	
	Business phone	
	Home phone	
	Cell phone	
	Fax number	
	Birthdate	
<b>Address</b>	Mailing Address	
<b>Frequent Flyer Programs</b>	Program name	
	Account number	
	Program name	
	Account number	
	Program name	
<b>Airplane Travel Preferences</b>	Position (e.g., aisle, window, center)	
	Location (e.g., forward, rear, wing, exit row, bulkhead, right, left)	
<b>Hotel Room Preferences</b>	Type (e.g., suite, king, double, single)	
	Smoking/non-smoking	
	Special requests	
<b>Rental Car Preferences</b>	Type *(e.g., mid-size, compact, sub-compact, full-size, full-size four-door, luxury, minivan, SUV)	
	Special requests	

\*upgrades to rental cars will not be covered by the State.



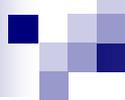
### Travel Expense Worksheet

Name			Phone Number		
E-mail			Vehicle License #		
Purpose					
<b>Trip hours</b>	<b>Dates</b>	<b>Departed</b>	<b>Returned</b>		
<b>Expenses</b>	<b>Dates</b>	<b>Details</b>			<b>Amount</b>
<b>Transportation</b>		<input type="checkbox"/> Air <input type="checkbox"/> Taxi <input type="checkbox"/> Rental car <input type="checkbox"/> Other			
		<input type="checkbox"/> Air <input type="checkbox"/> Taxi <input type="checkbox"/> Rental car <input type="checkbox"/> Other			
		<input type="checkbox"/> Air <input type="checkbox"/> Taxi <input type="checkbox"/> Rental car <input type="checkbox"/> Other			
		<input type="checkbox"/> Air <input type="checkbox"/> Taxi <input type="checkbox"/> Rental car <input type="checkbox"/> Other			
<b>Own car</b>		Mileage			
<b>Lodging</b>		Location			
		Location			
		Location			
		Location			
<b>Meals</b>		(Not to exceed \$34/day)			
		(Not to exceed \$34/day)			
		(Not to exceed \$34/day)			
		(Not to exceed \$34/day)			
<b>Conference fees</b>		Purpose			
		Purpose			
<b>Other</b>		Purpose			
		Purpose			
		Purpose			
		Purpose			
<b>Please attach receipts for all listed expenses, sign the form and send to MHSOAC Travel Coordinator</b>					
Signature			Date		



# Required Forms (cont'd)

- The MHSOAC Travel Coordinator will fill out the TEC and the Commission and Administrative Support Manager will review/approve the TEC.
- The TEC will be forwarded to the Dept. of General Services/Contracted Fiscal Services (CFS). Upon approval, CFS will send a check to the committee member.



# General Guidelines of State Per Diem

- MHSOAC Travel Coordinator makes reservations for:
  - Hotel
  - Airline
  - Rental cars
  - Bus or rail

# General Guidelines of State Per Diem (cont'd)

- MHSOAC will pay commuter type transportation costs from home or office to the meeting location.
- Where public transportation is not available or is available only with an undue loss of time, mileage for personal automobile is allowed.
- A comparison will be made between the cost of mileage and the cost of airfare. If the airfare is lower than the mileage, the amount of the airfare will be reimbursed to the committee member.

# General Guidelines of State Per Diem (cont'd)

- All travel to and from the airport should be made by airport shuttle or by public transportation, if available.
- Rental cars should be used only if other means of public transportation are not available. The MHSOAC Travel Coordinator will assist you in determining if a rental car is appropriate.
- Vehicles must be returned to the vendor with a full tank of gas. Should a vehicle be returned with less than a full tank, the charges will be collected from the committee member.

# General Guidelines of State Per Diem (cont'd)

## Mileage Reimbursement Rates

Vehicle Type	Mileage Reimbursement Rate
Personal Vehicle	57.5 cents per mile (effective 1/01/2015)
Private aircraft	50 cents per mile (taxable)
Bicycle	4 cents per mile (taxable)

# General Guidelines of State Per Diem (cont'd)

## Lodging

Type of Area	Maximum Rate (plus tax per day)
Normal Lodging	\$90.00
Napa, Riverside, and Sacramento Counties	\$95.00
Los Angeles, Orange, and Ventura Counties and Edwards AFB, excluding the city of Santa Monica	\$120.00
Monterey and San Diego Counties	\$125.00
Alameda, San Mateo, and Santa Clara Counties	\$140.00
San Francisco County and the City of Santa Monica	\$150.00

# Travel Meals Rates and Reimbursements

## RATES

<b>Breakfast</b>	Up to \$7.00
<b>Lunch</b>	Up to \$11.00
<b>Dinner</b>	Up to \$23.00
<b>Incidentals</b> (Included at the end of each 24 hours of travel)	Up to \$5.00

### **Breakfast May Be Claimed For**

Trips that begin at or before 6 a.m. and end at or after 8 a.m. the following day.

### **Lunch May Be Claimed For**

Trips that begin at or before 11 a.m. and end at or after 2 p.m. the following day.

**No lunch may be claimed on trips of LESS than 24 hours.**

### **Dinner May Be Claimed For**

Trips that begin at or before 5 p.m. and end at or after 7 p.m. the same day.

# Contacts

## Commission and Administrative Support Unit

- Lauren Quintero, Manager  
(916) 445-8716  
Email address: [lauren.quintero@mhsoac.ca.gov](mailto:lauren.quintero@mhsoac.ca.gov)
- Gina Van Nes, Travel Coordinator  
(Travel Claim Questions)  
(916) 445-8798  
Email address: [gina.vannes@mhsoac.ca.gov](mailto:gina.vannes@mhsoac.ca.gov)

# Contacts cont'd.

## **Commission and Administrative Support Unit**

- Kristal Carter, Travel Coordinator (Travel Arrangements)  
(916) 445-8724  
Email address: [kristal.carter@mhsoac.ca.gov](mailto:kristal.carter@mhsoac.ca.gov)
  
- Keely Connelly, Travel Coordinator  
(Travel Arrangements)  
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Email address: [keely.Connelly@mhsoac.ca.gov](mailto:keely.Connelly@mhsoac.ca.gov)

# Questions

