

SONOMA COUNTY PROBATION DEPARTMENT DEPARTMENTAL POLICY & PROCEDURES MANUAL			
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### **1.3 TRAVEL AND REIMBURSABLE EXPENSES**

#### **1. PURPOSE**

To provide policies and procedures for Probation Department Employees who travel while conducting County business. This policy supplements Sonoma County Administrative Policy 3-2, dated September 11, 2007.

#### **2. CRITERIA**

Travel expenses will only be authorized for the purposes of conducting official County business, representing the County in an official capacity, or for obtaining training of information directly beneficial to department operations.

#### **3. GENERAL INSTRUCTIONS FOR OUT-OF-COUNTY TRAVEL REQUESTS**

- a. For travel arrangements made outside of the training unit: as soon as travel plans are known, complete Section I of the Authorization for Travel and Expenses form and submit it to the appropriate supervisor and Division Director for approval under Section II. Include appropriate documentation regarding lodging, transportation, and registration so the vendor can be paid directly in advance.
- b. For travel arrangements made by the training unit: The training unit will complete the travel authorization for trainings they are coordinating. If there are safety concerns related to the itinerary, employee shall raise the issue to the supervisor and Division Director, who may bring this for further discussion with the training manager. Training unit will be informed of itinerary change requests no less than 7 days in advance of travel.
- c. For all travel: Employee completes Section III within 7 days after returning from travel. Attach required receipts for lodging, transportation, registration, and meals. Forward the signed form to the appropriate Division Director for review. The completed form with all necessary attachments must reach Accounting for processing no later than 30 days after your return date.
- d. If training occurs over an extended time period, advance requests should be separately made for each continuous training session. Any overpayment received should be submitted, along with the Authorization for Travel and Expenses, in the form of a check payable to Sonoma County Probation. Additional funds due to you from advance travel will be paid either from petty cash or by a County warrant.

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You may be issued a county credit card in order to charge expenses.

Per diem limits still apply, and the Authorization for Travel and Expenses form shall be completed, including receipts. No personal charges will be allowed on County credit cards.

**Note:** Travel expenses paid through the Staff Development and Wellness Allowance program must follow the procedures outlined for that program, and are available from the Human Resources Department.

#### 4. TRAVEL BY VEHICLE

- a. Staff shall utilize County vehicles whenever possible when conducting County business, unless a Division Director or above authorizes the use of a private vehicle due to extenuating circumstances. There is a pool of vehicles available from Fleet Operations in addition to the vehicles assigned to the department. Use of County vehicles must comply with [County Vehicle Use Policy 5-1](#).

- b. Staff may take county vehicles home if the route to their destination on the subsequent business day does not pass the location of their assigned work location and with approval from a Supervisor or Division Director.

- c. Utilizing the County Fleet must be pre-approved by a Supervisor and Division Director.

- d. County vehicles may be used to transport non-County employees only under these circumstances:

In emergency circumstances (i.e., medical emergency requiring visit to hospital); in this situation, an employee must contact their Supervisor as soon as practicable, and when transporting individuals for business purposes.

- e. Staff will not be reimbursed for mileage from use of a personal vehicle for trips outside the county, unless they have prior approval from a Division Director or above. Staff must pay their mileage when they elect to take their own vehicle because of personal preference or because non-county people are traveling with the County employee.

- f. When using a personal vehicle for travel on official County business, you must have a valid driver's license and meet the following requirements:

Personal vehicle is herein defined as an automobile, truck or van. Motorcycles, mopeds, scooters, bicycles, or similar vehicles may not be used to conduct County business.

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- i. Vehicles shall be adequately insured. The liability insurance on any private vehicle used in County business must conform to the minimum requirements set forth in the financial responsibility section (16020) of the California Vehicle Code.
  - ii. The vehicle shall be in sound mechanical condition adequate for providing required transportation in a safe manner.
  - iii. The vehicle shall be equipped with, and each occupant will be required to use, seat belts.
  - iv. The cost of damage and/or wear and tear to a privately owned vehicle used on County business is the responsibility of the owner.
- g. Reimbursement will be made at the current privately owned vehicle mileage reimbursement rate as set forth by GSA ([www.gsa.gov](http://www.gsa.gov)) by submitting a Personal Automobile Mileage Claim. The mileage reimbursement will be included in total wages but not in taxable wages on the annual W-2 form. All mileage reimbursement will be processed through the payroll department. There will be no reimbursement for mileage for personal vehicle use if the location of a training, meeting or event is within a 20-mile radius of your normal work location.

## 5. MEAL REIMBURSEMENTS

- a. For in-state travel: Meals may be claimed without receipts based on the rates published in the Per Diem memo, available on the [Probation Sharepoint site](#); these rates follow the local GSA rates and will be updated on an annual basis at the beginning of each calendar year.
- b. For out-of-state travel: Breakfast/lunch/dinner may be claimed without receipts based on the GSA rate (available here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>) for the destination city. Additional details will be included in the [Out-of-State Per Diem memo](#) available on Sharepoint.
  - Breakfast: Allowed when leaving the county prior to 7:00 am and will not return to the county and work site prior to 10:00 am.
  - Lunch: Allowed when leaving the County prior to 11:00am and will not return prior to 2:00pm.
  - Dinner: Allowed when you are out of the County prior to 4:00pm and will not return prior to 7:00pm.

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- a. Approval for meals outside of the above timeframes must be received and initialed by management in Section II of the [Authorization for Travel & Expenses](#) Form **prior to** attendance at any training.
- b. If meal expenses exceed the per diem rate, reimbursement will require receipts and approval by the Division Director or Deputy Chief. Under no circumstances will the daily reimbursement with receipts exceed the daily limit noted in the [County Travel Policy 3-2](#), which, as of this policy revision, is \$90/day inclusive of gratuities.
- c. Tipping up to 15% for meals is allowed and is included in the per diem rates.
- d. When meals are provided as part of an event, conference or training, the Department expectation is that attendees will participate in the meal activity and will not be reimbursed for the provided meal. If you have a dietary restriction, you will be required to work with the event provider in advance to see if an accommodation to the meal can be provided. If the accommodation is not satisfactory or cannot be made, in order to receive reimbursement for the purchase of an alternative meal, you must provide:
  - i. A receipt displaying what alternative meal was purchased and the cost associated (the alternative meal cost must not exceed the rates provided above in 5(b)).
  - ii. A note documenting what meal was served, the reason it did not meet your needs (without disclosing any specific medical conditions), what alternative meal was purchased, and the efforts made to obtain an accommodation from the event provider.
  - iii. Signature of the appropriate Division Director is required on the note.
- e. Courses lasting one week or longer may receive an advance payment for up to 80% of the per diem allowance with approval by the department head or designee. Requests for advance must be submitted to accounting at least 10 working days before scheduled departure. If training occurs over an extended time period, advance requests should be separately made for each continuous training session.
- f. Conference special event dinners/banquets held by the organizer may be reimbursed at actual cost if a receipt is provided showing the total cost of the meal. Pre-approval by the Deputy Chief is required for this expenditure using the Authorization for Travel and Expenses form.

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- g. With Department Head or designee pre-approval, meals or snacks, purchased by the department, for staff required to attend trainings, meetings and events, which are longer than 4 hours in duration and result in staff working during the meal time, may be paid or reimbursed by the County. The need to schedule meetings during mealtime should be necessary and extraordinary. In these cases, at a minimum, a written explanation must be provided detailing the business purpose and the number of people these items were provided for.
- h. Alcoholic beverages will not be reimbursed.
- i. If traveling in a group, an individual may cover the cost of meals for a group and claim reimbursement for the full amount. In this case, the number of people for whom the meal was purchased must be noted, along with names, titles, signatures and a statement of the business purpose.

## 6. TRAVEL TO OUT-OF- STATE DESTINATIONS

For out-of-state travel required for staff assigned to the Placement unit in Juvenile or completing transports or AB12 checks, follow the instructions for out-of-county travel.

All other out-of-state travel requests must be approved by the Chief 14 days in advance of the travel date using the Authorization for Travel & Expenses form. In an emergency situation, the immediate supervisor must justify approval after the fact in writing.

- a. The first two out-of-state travel requests in a fiscal year may be approved by the Chief. If a third out-of-state request is made within a fiscal year, it will require CEO approval.
- b. Transportation expenses may include bridge tolls, parking, bus, train, taxi or plane fares. Employees traveling to the same event are expected to coordinate transportation plans to keep costs to a minimum.
- c. The actual cost of travel should be reasonable, utilizing the least expensive methods available as determined by the Department Head or designee, given the particular circumstances involved in each trip.
- d. Lodging must be located at or near the site of the function attended. Hotel cost will be covered for the headquarters hotel if attending a scheduled conference. Room rate guidelines are the lesser of government/corporate or conference rate, whichever applies. It's your

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responsibility to provide adequate information and advance time to allow for processing payment directly to the hotel. Approval for lodging versus commuting will be at the discretion of the Deputy Chief.

- e. There will be no reimbursement for personal activities such as shopping and entertainment, as well as personal phone calls, fines, or gratuities.

## 7. REPLACEMENT HISTORY: [1.3]

Updated 06/11/2025

Updated 01/29/14;

Updated 04/30/2013;

Updated 07/25/2011;

Updated and renamed 1.3 replaced D25A, 10/2009;

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APPROVED BY:

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VANESSA FUCHS  
Chief Probation Officer