



**City of Corona**  
**Department of Water and Power**  
**and Maintenance Services**  
**Training Request Process**

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## Necessary Training Request Documents

- [Expense Summary Template](#)
- [Important Information Template](#)
- [Training Request Checklist](#)
- [Travel and Training Procedures](#)
- [Training Request Steps](#)
- [Training Request Form/Outlook Template](#)

## Completing the Training Request Form

The training request template can be found [HERE](#) on the G://Drive.

1. Read through the agreements and initial in each box.
  - a. Appropriate Documentation: There are certain items that are needed to prepare the packet for manager approval. This includes things like flyers outlining registration details, registration deadlines, and registration forms. If possible, please include materials that indicate whether or not meals are provided.
  - b. Important Processing Timeframes:
    - i. Local requests will need **a minimum of two weeks** prior to the start date for completion.
    - ii. Any training request involving airfare or overnight travel will require **a month prior to the start date**.
  - c. Fleet for Reservations: For local travel, should requestor need to use a city vehicle, they will need to contact Fleet for a city vehicle reservation. Non-local rental cars will be reserved by DWP Administrative Clerk.
  - d. Accommodations and preferences: If requestor has any special preferences regarding flights such as preferred destination time, hotel lodging, rental cars, etc., please input in the Special Accommodation Requests section. ***Special requests cannot be guaranteed.***

### AGREEMENTS

INITIAL IN BOX BELOW	
EX	I will attach appropriate backup documentation as listed below. I understand that if any information is missing, the request will be returned unprocessed. <b>The items to attach include: flier showing details of event (price, location, and agenda/itinerary), registration form, any additional relevant information (included meals, required materials, additional classes).</b>
INITIAL IN BOX BELOW	
EX	I understand that local requests need a minimum of two weeks prior to the start date of event.
INITIAL IN BOX BELOW	
EX	I understand that events requiring airfare or overnight travel need a minimum of one month prior to the start date.
INITIAL IN BOX BELOW	
EX	I understand that it is my responsibility to contact Fleet services for any vehicle reservations.

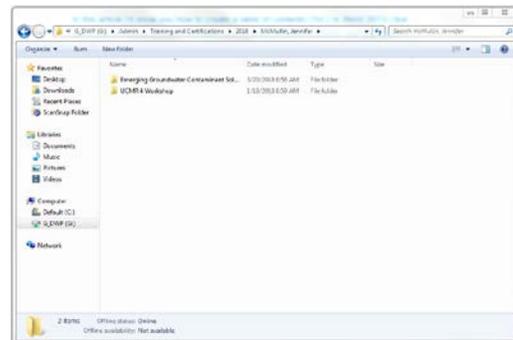
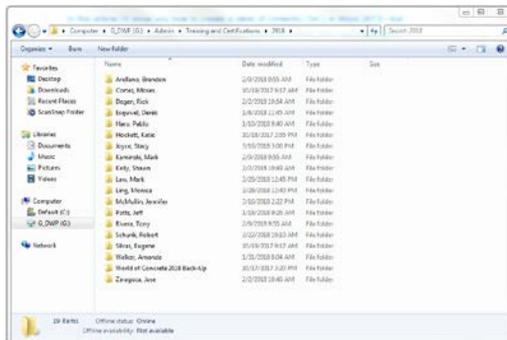
# CITY OF CORONA DEPARTMENT OF WATER AND POWER & MAINTENANCE SERVICES | TRAINING REQUESTS

<b>Name:</b> Vergel de Dios, Ryan <small>Last, First - Individual Requests Only</small>	<b>Date of Event/Travel Period:</b> 10/15 - 10/30/2018 <small>*If attending the event will require you to travel and arrive prior to the event and after the event has completed, enter the total travel time here with begin and end dates.</small>
<b>Registration Deadline:</b> May 31 <sup>st</sup> , 2018	<b>Event/Seminar/Class Name:</b> Example Event Name
<b>Vendor:</b> AWWA <small>If the training is provided by a membership organization (ex: ACWA, AWWA), please indicate and provide login information for accurate pricing and expense summary reporting.</small>	<b>Event Location:</b> San Francisco, CA
<b>Purpose for Attending:</b> The purpose or end result of training will be described here.	
<small>Please include any special accommodation requests below (optional; cannot be guaranteed). Any other miscellaneous important information can be listed here.</small> Any special accommodations that pertain to travel can be listed here.	

2. Complete the Training Request Form and forward to [TrainingRequests@CoronaCA.Gov](mailto:TrainingRequests@CoronaCA.Gov).

## Training Request Process

1. Send reply email to requestor letting them know we received the request and that it is being prepared for review and approval.
2. Print training request email & highlight date(s) of training and review registration deadlines and early bird discounts.
3. Create employee file in G drive (G:\Admin\Training and Certifications), select the year the training is taking place and create a folder in that year with employee's name. Be sure to create a separate folder with the title of each individual training that employee requests to attend.



4. Create a Training Request Form (TRF) Expense Summary (G:\Admin\Training and Certifications\Templates-Forms\UPDATED- Training Request Form with Reimbursement Form.xls) and be sure to include:

- Travel period(s)
- Title of training or conference and vendor/organization name
- Account number to charge
- Registration fees
- Hotel rate and tax
- Per diem rates (GSA) – available [here](#)
- Flight estimate and research transportation to Hotel/Airport
- Maps to/from home/event or airport

- a. Completing the Expense Summary:

**THIS PAGE IS TO BE COMPLETED BY OFFICE ADMIN STAFF**

**DWP EMPLOYEE TRF EXPENSE SUMMARY**

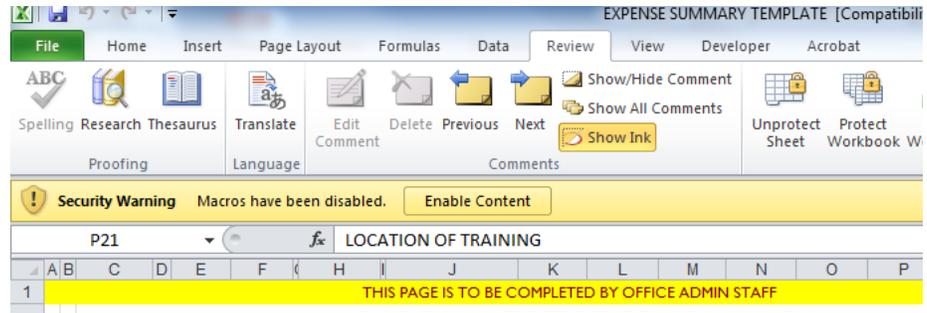
**GENERAL**  
 Employee Name: NAME OF REQUESTOR (Last Name, First Name) Travel Period/Day: DATE FOR TRAVEL (Multiple date format: 20.2020 or single day 2020)  
 Event/Seminar/Class: TITLE OF EVENT Acct#(s):

**REIMBURSEMENT**  
 Registration: Fee per person per day # of Person/Person Fee Subtotal # Attending Registration Tot \$0.00  
 Other Costs: (necessary to register) List Type: Other Related Costs Tot \$0.00  
 Overnight Stay? (Y/N) # of Nights Fee /Night Subtotal Film Tax Place Other Est. Fees Est. Hotel Tot \$0.00  
 Hotel: # of Nights Fee /Night Subtotal Film Tax Place Other Est. Fees Est. Hotel Tot \$0.00

**MEALS**  
 Event Location: LOCATION OF TRAINING  
 Per Diem Amt. by Location by Meal Type Enter Sunday Date (nearest to travel) Est. # of Meals/Trip Per Diem Trip Max  
 Breakfast Lunch Dinner Total Meals: \$0.00 Subtotal \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

**TRANSPORTATION**  
 Type: (Check all applicable boxes) City Vehicle/Messagem Other: List below Air Rental Car 2% Transit/Tram  
 Local Other Est. Expenses (Total) \$0.00  
 Enter Type & Expense: (ex: Taxi \$5.00)  
 Mileage # of days Total Mi. Reimbursement from table/actual \$0.00  
 Est. Tot Local Transp. Exp. + Mi. \$0.00  
 Transportation Out of Area (OOA) Est. Total \$0.00  
 Rental Car Other Shuttle  
 Est. Tot Transp. (LOCAL + Transp. OOA) \$0.00  
 Grand Tot Est. Exp. \$0.00

- i. **The Expense Summary, Actual Costs, and Reimbursement Forms will be protected and will not allow editing. Editing can only be done on unlocked cells (located all on Reimbursement Form). To edit cells for preparation of management approval, click the “Review” tab and click “Unprotect Sheet”. It will ask for a password. Use “Corona123”.**



- ii. Fill out Expense Summary with relevant information. Excel sheet incorporates formulas for necessary calculations.

b. Employee Mileage Reimbursement

- i. When requestor will drive to and from the location of training, their home address will be required. Using Google maps (and the shortest distance given by Google), calculate the roundtrip mileage from their home to DWP Building (755 Public Safety Way) and the roundtrip mileage from location of training to their home. Mileage is only reimbursable for miles in excess of normal commute.

- c. Using GSA to find Federal Per Diem rates:
  - i. Go to <https://www.gsa.gov/> and navigate to the Travel tab and click on “Per Diem Rates Look-up”.
  - ii. Enter the state and city of the training request and click “Find Rates”. Ensure that you are looking for the 2018 fiscal year.
  - iii. The next page will display the per diem rates for that location.

October 2017 - September 2018 The following rates apply for Sacramento, California. Max lodging by month (excluding taxes.) The last column is the Meals and Incidental Expense (M&IE) rate.

Primary Destination (1, 2)	County (3, 4)	2017 Oct	Nov	Dec	2018 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	M&IE (5)
Sacramento	Sacramento	\$128	\$128	\$128	\$128	\$128	\$128	\$128	\$128	\$128	\$128	\$128	\$128	\$64

This means that the lodging rate is not to exceed \$128 (pre-tax). Meals should not exceed \$64.

- iv. Scroll down to where it says “Additional Per Diem Topics” and click on “Meals & Incidental Expenses Breakdown (M&IE)”. Be sure to look for the respective M&IE number for training request city and see the amounts allotted for meals.

M&IE Breakdown

M&IE Total (1)	Continental Breakfast/ Breakfast (2)	Lunch (2)	Dinner (2)	Incidental Expenses	First & Last Day of Travel (3)
\$51	\$11	\$12	\$23	\$5	\$38.25
\$54	\$12	\$13	\$24	\$5	\$40.50
\$59	\$13	\$15	\$26	\$5	\$44.25
<b>\$64</b>	<b>\$15</b>	<b>\$16</b>	<b>\$28</b>	<b>\$5</b>	<b>\$48.00</b>
\$69	\$16	\$17	\$31	\$5	\$51.75
\$74	\$17	\$18	\$34	\$5	\$55.50

The M&IE total is \$64.00. The participant may spend up to \$15.00 for a reimbursable breakfast, \$16.00 for lunch, and \$28.00 for dinner. \$5.00 is left for incidental expenses.

- d. Rental Car estimates can be obtained at <https://www.enterprise.com/>. Reserving of car will be done through a different method. The City of Corona carries a corporate account with Enterprise. See *Training Requests Booking and Accommodations: Step 2, Letter C*.

- e. Websites to view hotels and airfare

**Websites to view  
hotels and airfare**

<https://www.expedia.com/>  
<https://www.orbitz.com/>

- 5. Before routing the request to management, delete all information at the top of the email, leaving only the information that the requestor completed. In addition, provide a summary of the total cost.
- 6. Forward training request to requestor's supervisor with an estimated cost for approval and all back up documentation attached.
  - a. Sample Email – *be sure to attach all supporting documents.*

*Hello,*

*[Requestor] is requesting to attend [name of training]. The approximate cost of the training is [cost]. Please reply with your approval.*

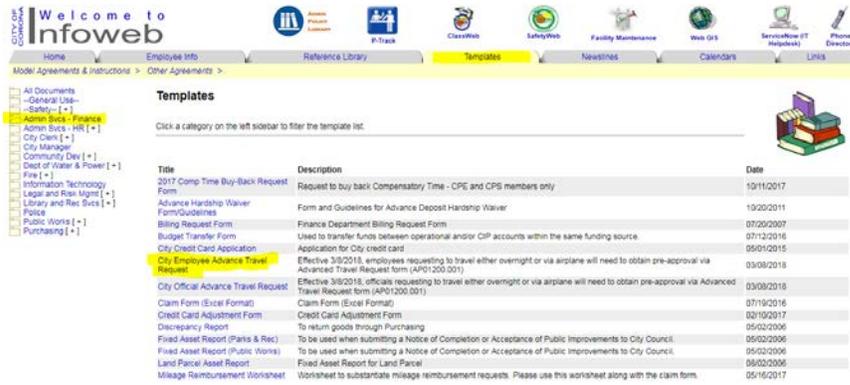
*Thank you,  
[Your name]*

- 7. If approved, forward supervisor's email to his or her manager (either Katie Hockett or Ed Lockhart) and request approval.

**If training is local, skip to step 9. If training involves any of the conditions in step 7, proceed to step 7.**

- 8. If training request is: **over \$2500.00** or **requires airfare or overnight stay**:
  - a. Prepare a physical packet with separate tabs for each item listed below. The order of the packet should be as follows:
    - 1. City Employee Advance Travel Request/Out of State Memo
    - 2. Training Request Email
    - 3. Expense Summary
    - 4. Registration Information
    - 5. Hotel Pricing
    - 6. Flight Estimate
    - 7. Car Rental Estimate
    - 8. Per Diem Rates

*The City Employee Advance Travel Request can be found on the infoweb: navigate to Templates → Administrative Services – Finance → City Employee Advance Travel Request.*



*\*Previous packets are available for reference.*

9. Have requestor’s manager look over estimates and initial the memo.
10. Send to Tom Moody for approval. Once Tom has approved and signed, inter-office packet to the City Manager’s office for further approval. To expedite the process, send email to Angela Nieto ([Angela.Nieto@CoronaCA.Gov](mailto:Angela.Nieto@CoronaCA.Gov)) in the City Manager’s office to let her know that the packet has been sent. **Ask her to scan the documents and send back to you once City Manager approves training request so you can begin registration and reserving accommodations.**

*Requestor is now referred to as a participant.*

11. Once approved, you can now register for training, book flights and hotel (if applicable), etc. and email Outlook appointment to participant. Be sure to save all receipts to participant’s training folder AND in the DWP Admin Receipts folder (G:\Admin\Credit Cards\ Pending Receipts\Administration, DWP). Using Adobe Acrobat, put the correct account number on the receipts.

*See Training Requests: Booking & Accommodations for a detailed process on the reservation process.*

12. Upon returning from the training, the participant is responsible for submitting itemized receipts for reimbursement and filling out the Travel & Expense Reimbursement Form and submitting it to Denise Burns within 15 days of completion of the training. *The Reimbursement form can be found on the 2<sup>nd</sup> tab of the Expense Summary Excel sheet.*

*See Completing the Reimbursement Form for instructions.*

## Training Request: Booking & Accommodations

### 1. Event Registration

- a. Contact vendor if they will allow a spot to be reserved for participant. This may involve sending the registration form by fax or e-mail as a PDF attachment to the vendor. If the vendor allows pre-registration with a purchase order, use a requisition number to reserve. For all others, use a claim form. A credit card method is used only if no other method is available and pre-authorization is given.

### 2. Transportation and Accommodation

- a. Airfare: If air registration is needed, look at airline carriers and search coach class fare specials or government rates. Sometimes the government rate is actually higher than an internet special. Refundable airfare is always preferred.

*\*\*Consult participant if there is a preferred date and time to leave to training.*

- i. Use city credit card to secure airfare.
- ii. The SST must provide their email to receive a copy of the confirmation. A copy of the confirmation must be saved in the employee's file. The receipt must be filed in the credit card folder to reconcile the statement.

- b. Car: Once the participant has received confirmation of their event, the participant will need to contact Fleet Services to reserve a vehicle.

*\*Any additional modes of transportation necessary while on trip will require a receipt for reimbursement upon return of travel, such as taxi or shuttle, bus or train.*

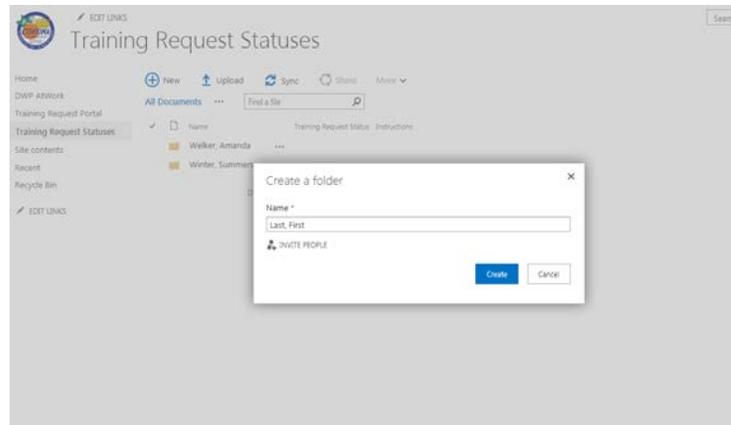
- c. Rental cars: If a rental car is needed, contact Enterprise Fleet at 1-800-352-6847 and give group branch number, account number, and division type.

<b>Group Branch Number: #2FL4</b>		<b>Account Number: #480726</b>
<b>Corporate Non- Replacement</b>	Regular rental billed back to invoice	
<b>Maintenance Replacement</b>	Replacing car in the shop or out of commission due to service or damage	
<b>Customer Pay</b>	Not billed to company; using credit card and driver paying on own	
<b>Commercial Truck</b>	Large trucks and vans billed back to invoice	

- d. Lodging/hotel: Overnight accommodations should be where conference/event is being held if applicable and economical, otherwise use next best available hotel option and proceed accordingly, ensuring to stay within the Federal Per Diem limit for area.
  - i. Request hotel room(s) and type.
  - ii. Provide participant(s) information and hold room with City credit card, and if needed request an authorization form to submit so that the employee will have no issue checking in.
  - iii. Ask in advance if they allow payment by check. If so, get complete vendor payment information.
  - iv. Complete a claim form to request A/P payment for hotel.

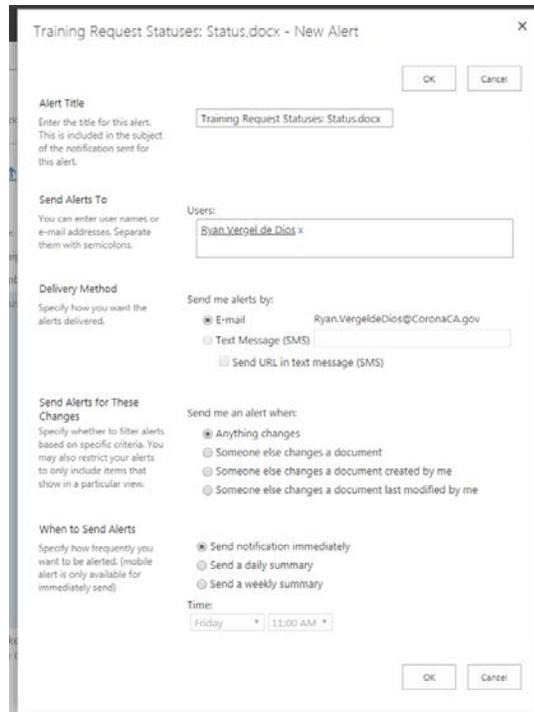
3. Participant Notification/Status Updates

- a. Navigate to the SharePoint website that provides participants with documents and status updates.
- b. Create a folder with the name of the participant (Last Name, First Name). Inside of that folder, create another folder with the date and title of the event.



- c. When inside the event folder, create a word document by clicking “New” and then “Word Document”.
- d. Create folders for each specific document. For example, a “Reimbursement Form” and a “Receipts and Confirmation” folder. Sometimes, trainings are requested far in advance; this will be so the participant can access the documents at any time he or she needs it in the event that they are misplaced.
- e. When the reimbursement form is uploaded *inside* the Reimbursement folder, be sure to include this in the “Instructions” section:
  1. Open form.
  2. The reimbursement form will auto-populate in areas that do not require an input. Cells that do not require input are locked and cannot be edited.
  3. The only areas require information are marked in a salmon color. The daily totals participant paid must be detailed in the table for the week and itemized receipts must be attached to the reimbursement form.
  4. Input the cost spent per day that is in excess of what city has funded, ensuring that it is within the Federal Per Diem rate. Be sure to provide itemized receipts.
  5. Print the form, sign and date, and give to manager for approval.
  6. Once approved, email Denise Burns in Finance: [Denise.Burns@CoronaCA.Gov](mailto:Denise.Burns@CoronaCA.Gov).
- f. To notify participant of any changes to his or her status, click the checkmark that is located next to the Status document, then click Files, and then “Alert Me”. Click “Set Alert On This Document”. Under Send Alerts To, insert **ONLY** the user’s email. This will alert the user any time there has been a change in the status. It is important to note that these emails are generated

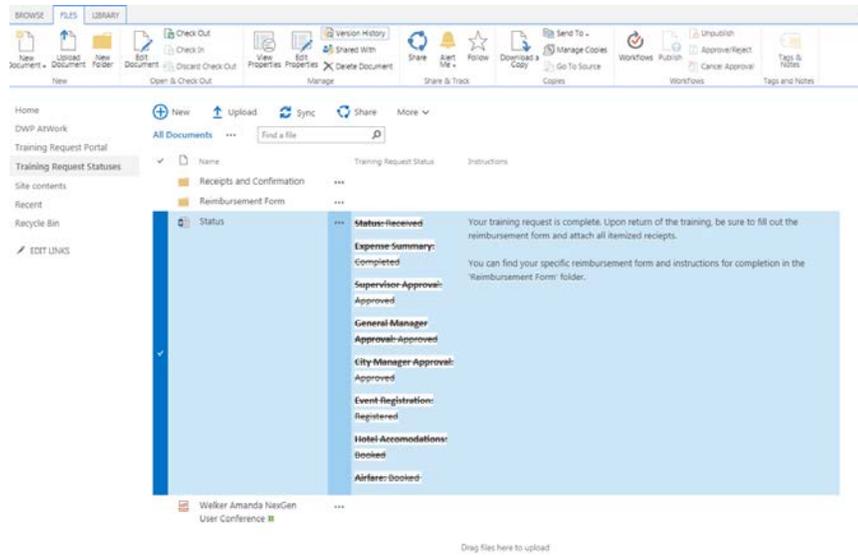
automatically by the system after the DWP Administrative Clerk changes the status section. Therefore, be sure to continuously update this as the training request is routed.



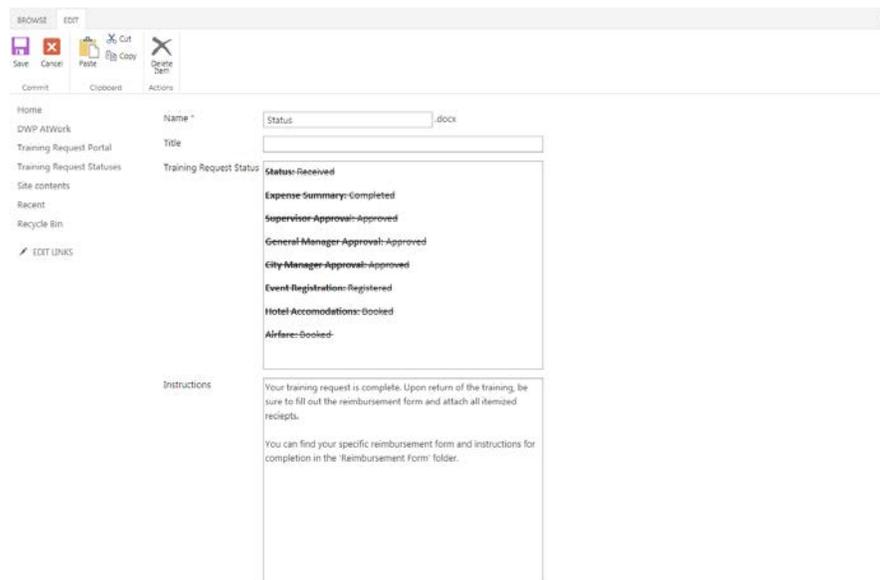
- g. Inside the Document, continuously update as each step in the process occurs. Only include the status updates that are applicable. Be sure to “strike out” each one to show participant it has been completed. Additionally, copy and paste the contents of the word document into the “Training Requests Statuses”. This will appear in the form of a text box. ***To do this, see below Step H.***

~~Status: Received~~  
~~Expense Summary: Completed~~  
~~Supervisor Approval: Approved~~  
~~General Manager Approval: Approved~~  
~~City Manager Approval: Approved~~  
 Event Registration: Registered  
 Hotel Accommodations: Booked  
 Airfare: Booked

- h. Checkmark the ‘Status’ document and click ‘Files’ and then ‘Edit Properties’.



- i. Below is an example of the copied and pasted text in the Training Request section.



- j. Once the training request is fully complete, email participant with the important documents. Be sure to also upload these to the SharePoint website so that users can access this at any time. Create an Outlook calendar appointment for participant for the duration of the training and send it to user.

## Completing the Reimbursement Form

**\*\*\*Reimbursement must be submitted within 15 days of completing training\*\*\***

1. Open the Expense Summary form that was sent by the DWP Administrative Clerk. The Reimbursement form is located on a different sheet.
2. The reimbursement form will auto-populate in areas that *do not* require an input. Cells that do not require input are locked and cannot be edited.
3. The only area that requires input is the 'DAILY EXPENSES' table. Input the price in the appropriate category and day the cost was incurred. The totals will automatically add up.

Event Registration:	\$0.00	Transportation:	\$0.00				
Hotel Accomodation:	\$0.00	Others:	\$0.00				
Mileage Reimbursement:	\$0.00	Meals:	\$0.00				
<b>TOTAL AMOUNT FUNDED BY EMPLOYEE</b>			<b>\$0.00</b>				
<b>DAILY EXPENSES:</b>							
FEDERAL PER DIEM RATES	BREAKFAST:	\$13.00					
	LUNCH:	\$15.00					
	DINNER:	\$26.00					
Date:	Sun 13-May	Mon 14-May	Tues 15-May	Wed 16-May	ThurS 17-May	Fri 18-May	Sat 19-May
Event Registration:							
Hotel Accomodation:							
Transportation:							
**Breakfast with itemized receipt:							
**Lunch with itemized receipt:							
**Dinner with itemized receipt:							
Misc. (itemize):							

For each category, simply input the price paid on each day. It will automatically add in the 'funded by employee' section. Be sure to include itemized receipts

\*\*\*Note: only meals with itemized receipts are reimbursable and *must not* exceed Federal Per Diem rates.  
 \*\*\*Check the box next to the amount if the item claimed relates to taxable meal reimbursement.  
 Refer to the City's Travel Policy to determine if a meal reimbursement is taxable.

4. Print the form, sign and date, and give to manager for approval.
5. Once approved, email **Denise Burns** in Finance: [Denise.Burns@CoronaCA.Gov](mailto:Denise.Burns@CoronaCA.Gov)

## Training Request Checklist

Name of Requestor:		Date:	
Check Complete	Tasks		
<input type="checkbox"/>	Send reply email letting know received		
<input type="checkbox"/>	Print training requests and review registration deadlines		
<input type="checkbox"/>	Create employee file		
<input type="checkbox"/>	Create Expense Summary and obtain necessary documents		
<input type="checkbox"/>	Forward request to requestor's supervisor with an estimated cost. Be sure to include all backup documentation.		
<input type="checkbox"/>	If approved, send to requestor's supervisor with an estimated cost for approval and all backup documentation attached		
<input type="checkbox"/>	If estimated cost is OVER \$2500.00 of requires airfare or hotel, forward to Tom Moody for approval. If applicable, be sure to FIRST have requestor's manager initial memo.		
<input type="checkbox"/>	If approved, inter-office packet to City Manager for further approval.		
<input type="checkbox"/>	If approved, begin registration for training, book flights and hotel, and email Outlook appointment to register.		

