

*DeLums*

INDUSTRIAL RELATIONS

FIELD  
MANUAL

JULY 1959

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### Travel Authorization

To be reimbursable, travel must be authorized by the employee's supervisor.

### Discontinuance of Allowances

When a state officer or employee remains in one location for more than one month per diem allowance or allowance for hotel and meals at such location thereafter shall be discontinued, except that in unusual cases an allowance approved by the Department of Finance, not in excess of the allowances fixed by these rules, may be paid. (B/C 708)

### Travel Allowance While on Sick Leave

When a state officer or employee is granted sick leave while away from his headquarters for purposes of State business, such officer or employee may claim reimbursement for travel expenses in accordance with the allowances prescribed by these rules during such sick leave provided the allowances for travel expenses shall not be authorized for a period exceeding 3 days. The time limitation prescribed by this section may be exceeded in unusual cases approved by the Department of Finance. (B/C 727)

### Traveling Expenses for Two Fiscal Years

Since the State fiscal year ends on June 30, it is necessary that trips begun in June and continued into July be divided at June 30 and put on separate claims.

## ADVANCES

### Travel Advance (for meals, lodging, etc.)

Before starting on a trip, if the employee desires, he may contact his supervisor for a Travel Advance. When the trip has been completed, if a Travel Advance was obtained prior to starting on the trip, a check for the difference between the amount of the claim and the advance will be sent to the employee. If no advance was obtained the employee will receive the full amount of his claim less any corrections.

Employees traveling occasionally must refund to the Department of Industrial Relations the amount by which the advance exceeds the travel claim.

Travel advances should not be taken in excess of the amount needed to the end of the current month.

### Transportation Advance (for train, air travel, etc.)

If a transportation advance is desired the employee may request it through his supervisor.

Tax exemption certificates must be presented to the ticket agent at the time the tickets are purchased. This certificate may be obtained from the employee's supervisor.

Private credit cards may not be used to purchase transportation.

## Submitting Travel Expense Claims

"Expense claims should be submitted at least once a month but not more often than twice a month." (B/C Rule 700)

Obtain a supply of Travel Expense Claims, Form 262, from your supervisor.

Accounting Section requires two copies of this document. If any copies are required by the Division, these also should be prepared. Submit the completed claim to your supervisor for approval.

Corrections changing total expense must be initialed by claimant and supervisor.

### Instructions for Completing the Expense Claim

Please print or type name after "Claim of".

The claim may be handwritten or typed. Some Divisions provide clerical help for typing the expense claim. If this is done, only a list of costs incurred need be submitted through Division channels. (See the reverse side of the claim for instructions covering routine items of expense.)

The time of departure and return should be expressed by the 24-hour clock. Example: 1:30 p.m. is 1330, 6 a.m. is 0600, 12 midnight is 2400.

The license number of every car used by an employee, whether as driver or passenger, must be indicated throughout the month. Place the license number in the upper right hand corner above the date. If the license number varies during the month, it may be inserted in column "between what points" under Instruction 10 and dittoed where applicable.

Form 263 submitted in duplicate is sufficient when the claim is only reimbursement of private car mileage.

Allowances Not Permitted at Residence

Each officer and employee when making claim for travel expenses must show his residence on the expense account. Per diem allowance or allowance for hotel and meals will not be permitted at such residence. (B/C Rule 709)

If In Field at Beginning of Month Show:

Original date and hour of departure on claim under remarks.

Receipts: (For instructions regarding expenses outside the State, see Pages 16, 17 and 18.)

Receipts or voucher shall be submitted for every item of expense except the following:

- Railroad fares and bus fares where the fares are available in published schedules and the travel is entirely within the State of California.
- Meals
- Street car, ferry, bridge and road tolls.
- Long distance telephone or telegraph charges, if the call is over \$2.50, a voucher must be attached to the expense account.
- Taxi, limousine, or hotel bus fares when necessary for official business.
- All legal expenditures of \$1 or less (B/C Rule 710)

Receipts should be made out to the employee and receipted as "PAID" by the person receiving the money.

Receipt must be dated and must show both name and location of vendor.

- If receipt stamp is registry printed no name or initials are necessary acknowledging receipt.
- If receipt is on a printed billhead and "PAID" stamp shows the firm name initials will suffice.
- If receipt is not on printed form showing in printing the firm name and location, it must be signed for the firm over at least the full last name and title of an employee of the firm.
- In case a receipt or voucher has been lost, a duplicate should be obtained whenever possible, or else a complete statement shall be made and attached to the claim. In the case of hotel vouchers, a duplicate must be secured.  
(B/C Rule 710)

Receipts for postage must be itemized to show number of stamps bought of each denomination.

Altered receipts are not acceptable.

Receipts for hotel must show single rate if room is occupied by more than one person.

Meals and rooms on private credit cards cannot be processed. Get a travel advance through your supervisor if funds are needed.

### Baggage

Established charges by common carriers or terminal stations for the handling or transportation of necessary personal or official baggage will be allowed. (B/C 705b effective 11-15-56)

### Incidental Traveling Expenses

A maximum allowance of \$1 may be claimed, without itemization, for incidental traveling expenses during each full calendar day (0001 to 2400) or major fraction thereof. A major fraction is defined as 12 or more hours. Incidental traveling expenses are included in per diem rates and shall not be claimed separately by employees claiming a per diem allowance. (B/C 712i effective 7-1-59).

### Railroad Transportation

No more than the actual fare, tax exempt, on any transportation service in accordance with the latest tariffs at the time the trip was made, shall be allowed. Round trip rates shall be used whenever possible. (B/C Rule 715a)

Exemption should be claimed at the time of purchase of transportation by means of a tax exemption certificate. Where payment of such tax is necessary, reimbursement may be allowed, but where the amount of the tax exceeds 25 cents, explanation as to the necessity therefor shall accompany the claim. (B/C Rule 725)

Reimbursement for roomette Pullman accommodations will be allowed. (B/C Rule 715b)

Where it is necessary to use Pullman accommodations more expensive than a roomette, a full explanation stating the facts constituting the official necessity shall accompany the expense account, together with a receipted voucher. (B/C Rule 715d)

Unused portions of railroad and Pullman tickets should be returned to Accounting Section at 965 Mission Street, San Francisco, for refunds if a transportation advance was received. Under other circumstances employees should obtain their own refunds.

Do not use a private credit card for purchase of tickets used in State travel. Get a transportation advance if funds are needed.

### Airplane Travel

Claims for airplane travel shall be allowed when in conformity with the latest regular, published airplane tariffs and when vouchers are presented in support of the claim. (B/C Rule 716)

The employee may, if he desires, use his own funds for the purchase of airplane tickets and be reimbursed at the time of submitting his expense account.

Air coach should be used whenever possible in preference to first class planes. Attention should be given to the coach class air service offered by airlines between San Francisco and Los Angeles and Sacramento. Advance reservations should be made for this service. Reservations may be made with several stop overs.

The fares on these coach class planes are much cheaper than regular air line fares - in fact, more economical than travel by night trains. This mode of travel is recommended whenever work schedules and appointments can be fitted to air coach departure and arrival times. (F/SAM 0731.1)

Unless you reconfirm your continuing or return reservation it will be cancelled 6 hours before departure and your seat will be made available to someone else.

Exceptions: You do not have to reconfirm even though staying overnight, when your stay will be less than 12 hours.

Exemption should be claimed at the time of purchase of transportation by means of a tax exemption certificate. Where payment of such tax is necessary, reimbursement may be allowed, but where the amount of the tax exceeds 25 cents, explanation as to the necessity therefor shall accompany the claim. (B/C Rule 725)

### Airplane Travel-Continued

Refund for unused portions of a plane ticket may be obtained from the air line. The refund form or letter which will be issued by the air line must be attached to the Traveling Expense Voucher on which the transportation charge appears.

Credit cards are not used by this Department for airplane travel.

Private credit cards may not be used on State business.

### Unusual Expenses

The need for incurring an unusual expense such as hiring public stenographers, renting meeting rooms, and other out of the ordinary activities must be anticipated and requests submitted to Business Services in writing at least two weeks in advance, since approval of the Department of Finance must be obtained before such activities can be allowed. Costs of such activities, if allowed, must be billed in triplicate to the Department of Industrial Relations. Such expense cannot be reimbursed on expense accounts.

## Moving

When an employee is required by his Division Head to change his place of residence the employee may receive his actual moving expenses by common carrier not to exceed 8000 pounds. When such moving is contemplated notice should be given to Business Services Section so that any unusual circumstances may be recognized and planned for. All original receipts shall be attached to the travel claim. If desired the common carrier may submit an itemized invoice in triplicate to this Department. No Federal Tax may be claimed.

Reimbursement will be allowed not exceeding \$100 in total for miscellaneous expenses such as disconnecting and connecting household appliances, or dismantling and installing antennas. Such reimbursement will not include any charges for material or parts, or for installing utility outlets. (724d Effective 12/29/56)

Reimbursement will be allowed for insurance of household effects not exceeding the cost of insurance coverage at valuation for each pound of household effects shipped.

If moving expense is in excess of \$500, three competitive bids must be submitted to Business Services for Department of Finance approval since a written contract must be prepared.

Unusual and unavoidable hardship may be alleviated by the Director of Finance through advance approval of higher maximum allowances.

Relocation expenses for lodging, meals and incidental traveling expenses or per diem allowance may be reimbursed up to a limit of 30 days at new headquarters while locating a permanent residence. Effort should be made to limit relocation expense within the 30 day maximum to the minimum time necessary to locate a residence.

Methods of moving other than common carrier are possible. Contact your headquarters office for instructions.

## Attending Conventions or Conferences

Traveling expenses shall not be allowed for attending conventions or conferences within the State of California, unless approval in writing from the Department of Finance has been obtained before attending the convention or conference (except where no more than two State officers or employees subject to this rule from any one Department attend such convention or conference and the registration fee per person does not exceed \$7.50) (B/C Rule 704)

Form 256, "Request for Travel Expense Approval" is used to obtain approval to attend conventions and conferences. Request for approval should be submitted by the Accounting Office at least 3 weeks prior to the date of the conference to permit clearance of documents prior to the conference.

### MAXIMUM RATES-GOVERNOR'S APPOINTEES ONLY

#### Per Diem

In lieu of allowances for hotel and meals, an allowance of \$19.00 a day may be claimed by Governor's appointees. For periods less than a full day the allowance which includes incidental traveling expenses shall be computed at the rates of \$11.00 for hotel, \$1.75 for breakfast, \$2.50 for lunch and \$3.75 for dinner. In cases of travel outside the State an allowance of \$21.00 a day may be claimed. For less than a full day the allowances for Out-of-State travel are: \$13.00 for hotel, \$1.75 for breakfast, \$2.50 for lunch, and \$3.75 for dinner. (B/C 714 effective 7/1/59).

#### Meals with Incidental Expense

Governor's appointees who claim meals and incidental traveling expense are allowed a daily rate of \$7.25 for meals: \$1.55 for breakfast, \$2.00 for lunch, \$3.70 for dinner. Where lunch is the only meal charged, \$1.00 is

allowed. No hotel may be charged.  
(Board of Control 712 effective 7/1/59).

(For expenses Out-of-State, see Pages 16, 17 & 18. . . .)

#### ROUTINE EXPENSES

##### Hotel

Claims for hotel accommodations shall not exceed \$11.00 a day for Governor's Appointees and \$7.00 a day for all other officers and employees, except in cases of travel outside the State. (Board of Control Rule 711a effective 7/1/59)

Employees who travel should identify themselves when registering at hotels or motels as State employees traveling on business. Some establishments offer a lower commercial rate for business travelers or for State employees. Such rate concessions are obtained by giving identifying information when registering. (F/SAM 0784)

Hotel charges are listed on the expense voucher under the date PAID.

The receipt must show days covered.

If more than one person occupies a room the single rate must be shown. If a member of the immediate family shares a room the single rate will be paid; otherwise, half rate only may be claimed.

##### Meals

The maximum allowance for meals is \$8.00 a day for Governor's appointees. If separate meals are charged, the maximum is \$1.75 for breakfast, \$2.50 for lunch, and \$3.75 for dinner.

Meals-Continued

The maximum allowance for meals is \$5.75 a day for all other officers and employees, except in cases of travel outside the State when \$6.75 a day is allowable. When separate meals are charged, the maximum is \$1.30 for breakfast, \$1.75 for lunch and \$2.50 for dinner, except for travel outside the State when the maximum allowance is \$1.55 for breakfast, \$2.00 for lunch and \$3.20 for dinner.

The maximum allowance for meals on trains for all officers and employees is \$7.45 per day, the amount expended to be at the will of the individual. Where separate meals are charged, a limit of \$1.90 for breakfast, \$2.15 for lunch, and \$3.40 for dinner is fixed. (Board of Control 712f effective 7/1/59)

Each officer and employee when making claim for traveling expenses must show the time of departure from and return to headquarters or home.

Should time of departure from headquarters be after 7:00 a.m., no allowance may be claimed for breakfast.

Should the time of departure from headquarters be after 12:00 noon, no allowance may be claimed for lunch.

Should the time of departure from headquarters be after 7:00 p.m., no allowance may be claimed for dinner.

Should the time of return to headquarters be prior to 7:00 a.m. no allowance may be claimed for breakfast.

Should the time of return to headquarters be prior to 12:00 noon, no allowance may be claimed for lunch.

Should the time of return to headquarters be prior to 7:00 p.m., no allowance may be claimed for dinner.

### Meals-Continued

Time of departure and return as herein used, means the time the employee starts from, or returns to his office or, when leaving on a trip or returning from a trip without going to the office, his home.

Where lunch is the only meal claimed on a one-day trip away from headquarters, the maximum allowance is \$1.00 for officers and employees, nonsalaried members of boards and commissions excepted. (Board of Control Rule 712h effective 10/5/56)

An employee while on night duty away from his headquarters may claim reimbursement for a night meal (equivalent of lunch) provided he leaves his headquarters prior to 10 p.m. and returns after 3 a.m. and provided further that reimbursement for not more than three meals may be claimed in any one calendar day or 24 hour period covering consecutive parts of two calendar days. Where a night meal (equivalent of lunch) is the only meal charged, a maximum amount of \$1.00 will be allowed. Each night duty travel expense voucher submitted must include the statement "Assigned to night duty away from headquarters." (Board of Control Rule 712e, effective 10/5/56).

A justification is required by the Controller for meals eaten in the following locations by employees with headquarters or residence in Los Angeles:

Athens (portion)	Northridge
Bairdstown	Olive View
Barnes City (portion)	Pacific Palisades
Bel Air Estates	Pacoima
Beverly Glen	Palms
Beverly Hills	Playa Del Rey
Boyle Heights	Reseda
Brentwood Heights	San Pedro
Canoga Park	Sawtelle (portion)
Castellammare	Sepulveda
Chatsworth	Sherman Oaks
Culver City	Studio City
Eagle Rock	Sunland
East Los Angeles	Sun Valley
(West of Indiana St.)	Sylmar
Encino	Tarzana
El Sereno	Terminal Island
Florence	(portion)
Gilmore Island	Toluca Lake
Girard (Woodland Hills)	Torrance (between
Granada (or Granada Hills)	Western Ave. &
Harbor City (portion)	Normandie Ave.)
Highland Park	Tujunga
Hollydale	Universal City
Hollywood	Van Nuys
Hyde Park	Venice
Lakeside Park	Watts
La Tijera (portion)	Westchester
Laurel Canyon	West Hollywood
Mar Vista	(portion)
North Hollywood	West Los Angeles
	Westwood
	Wilmington
	Woodland Hills

A justification is required by the Controller for meals eaten in the following locations by employees with headquarters or residence in San Diego:

Clairemont	Ocean Beach
Encanto	Pacific Beach
La Jolla	Paradise Hills (portion)
Linda Vista	Point Loma
Mission Beach	

When it is necessary for a State agency to require an employee to work overtime in excess of two hours following the closing time of the office of such agency, and where sufficient time cannot be granted to the employee to travel to his home for his evening meal and return before his overtime service must begin, he may at the request of the agency, and with approval of the Department of Finance having been secured in advance, claim an allowance for dinner at his headquarters. Copy of the Department of Finance approval must accompany such expense claim.  
(B/C Rule 712g)

#### Expenses Outside the State

Out-of-state travel is defined as travel to or from a point outside the State of California for the purpose of transacting state business at a point outside the State. It does not include trips through or necessary stopovers in an adjoining state incidental to travel between two points within the State.

The Director of Finance hereby gives blanket authorization for incurring travel expenses in states bordering on this State provided such expenses are incurred solely in trips through, or necessary stopovers in, the bordering states incidental to travel between two points in this State. Claims for such expenses should bear the notation "Expenses in bordering state were incidental to work performed in California". AM-0710  
(Rev. 7/1/57)

## Expenses Outside the State - (Continued)

A claim for expenses for out-of-state travel must be submitted on a separate expense account.

All vouchers for transportation, including trains, buses and airplanes are necessary when traveling outside the State of California. Hotel will be reimbursed at any amount paid if no cheaper accommodations are available and the hotel voucher is submitted.

For further instructions for claiming reimbursement for Out-of-State Travel, see page 11.

### Out-of-State Travel - Form 257

Requests for approval of all travel out-of-state will be submitted on standard Form 257 to the Department of Finance. Form 257 will be forwarded in quintuplicate (five copies) at least ten days in advance of the departure date. Divisions should inform the Director of desired Out-of-State Travel no less than three weeks in advance.

Absences from the State on state business at no expense to the State, also require approval on Form 257 except for absences in adjoining states for less than five consecutive working days. A. M. 0711 - (Rev. 11/1/56)

MAXIMUM RATES

	<u>EMPLOYEES</u>	<u>GOVERNORS APPOINTEES</u>	<u>GOVERNORS APPOINTEES</u>
<u>In State</u>		<u>Meals &amp; Incidental</u>	<u>Per Diem in lieu of</u>
<u>Meals:</u>		<u>Traveling Expense</u>	<u>hotel, meals &amp; in-</u>
			<u>cidental expense</u>
Daily Rate	5.75	7.25	\$8.00
Breakfast	1.30	1.55	1.75
Lunch	1.75	2.00	2.50
Dinner	2.70	3.70	3.75
Hotel	7.00	None	11.00
American Style			
(Meals and Room)	12.75	None	18.25
Per Diem	None	None	19.00

1  
18  
1

OUT OF STATE

<u>Meals:</u>			
Daily Rate	6.75	8.25	8.00
Breakfast	1.55	1.80	1.75
Lunch	2.00	2.50	2.50
Dinner	3.20	3.95	3.75
Hotel	Actual Expense	None	13.00
American Style			
(Meals and Room)	Actual Expense	None	Actual Expense
Per Diem	None	None	21.00

MEALS ON TRAIN For all appointees and employees are:

Daily Rate	7.45	<u>EMPLOYEES</u>	<u>GOVERNOR'S APPOINTEES</u>
Breakfast	1.90		
Lunch	2.15	<u>LUNCH ALONE:</u>	
Dinner	3.40	No other	\$1.00
		expense	\$1.00

## Purchasing Supplies

### Ordering

### Emergency Purchases

When any article or service is purchased in an emergency the vendor should be requested to submit his invoice in triplicate to this Department. If he refuses and the employee is required to pay cash, a receipt must be obtained to support reimbursement. A detailed explanation must also accompany the claim. Equipment may never be purchased in this manner and many services may be refused if not approved in advance. Avoid this procedure.

Stationery, such as paper, pens, penholders, pencils, clips and other materials shall be obtained through memorandum to your supervisor. Where such articles are purchased in an emergency, a full explanation, stating the facts constituting the emergency, shall accompany the expense account. (B/C Rule 721)

### Expenses Not Reimbursable

No personal expenses such as laundering, valet service, haircuts, etc. shall be allowed. (Tips of any kind may not be claimed.) (B/C Rule 705).

### Privately Owned Automobiles

Private automobiles will be used on State business only when common carrier transportation or State automobiles cannot be effectively used. (F/SAM 4140)

The supervisor will attempt to make a State car available whenever possible since private car usage is more costly to the State.

Reimbursement on a mileage basis for expenses of transportation by claimant's privately owned automobile on State business shall not be allowed whether within or outside of the State, unless permission of the Department of Finance has been obtained in advance of such use, and the case is within one of the following categories:

- (1) Where a common carrier does not parallel the trip or transportation by common carrier is not available; or
- (2) Where it is necessary to use an automobile at the end of a trip or to make stops on official business enroute; or
- (3) Where two or more state officers or employees are transported in the private automobile and mileage claimed is less in amount than their aggregate rail fare, not including Pullman accommodations, would be; or
- (4) Claimant is in one of the following categories: directors of departments, commissioners or chiefs of divisions appointed by the Governor, members of boards and commissions whose appointments are authorized by the Constitution, members of boards and commissions appointed by the Governor, and nonsalaried board & commission members.

Privately Owned Automobiles - Continued

- (a) All claims for mileage must be filed on Department of Finance Form 263 and the reason for use checked in the lower left corner of the Form 263.
- (b) If a State car is not available the maximum rate for which a claim may be allowed for the use of privately owned automobiles is 10 cents per mile for the first 150 miles; 8 cents per mile for the next 450 miles, and 6 cents per mile thereafter. The rate allowed herein shall be based on the total mileage claimed in a calendar month. If a State car is available, the maximum rate for which a claim may be allowed for the use of the privately owned automobile shall be 6 cents per mile.  
(B/C Rule 718d)
- (c) It has been determined that if there is no agency car available to an employee who it is estimated will travel less than 40 miles during the day, or for a trip of two or more days but averaging less than 40 miles a day, it is feasible to allow a private car to be used at the higher allowance rate without the employee determining State Pool car availability. Pool cars will be used primarily for higher mileage trips.

Privately Owned Automobiles - Continued

- (c) Similarly, the higher allowance can be given where the employee's headquarters is located at such a distance as to make the time it takes to travel to and from a State Pool to use a State car unreasonable in relation to the amount of travel involved. The over-all cost to the State is the primary factor to be considered in such cases.
- (d) Where a claimant's privately owned automobile is used on State business and mileage is not authorized or allowed for any reason, first class train fare between the points traveled in accordance with the latest tariffs at the time the trip was made, may be allowed as reimbursement in lieu of the expenses of the use of such automobile. Pullman fare may not be included in the rail fare. Actual times of arrival and departure and means of transportation must be shown. Reimbursement for meals and hotel expense shall be in accordance with B/C Rule 711 and 712.
- (e) In any case in which reimbursement for expenses of transportation by private automobile is claimed, whether on mileage or train fare basis, the license number of the automobile used as well as the name of each state officer, employee, or board, commission or authority member transported on the trip shall be stated. As such reimbursement is for the expense of use of the automobile regardless of the number of persons transported, no reimbursement for transportation shall be allowed any passenger in an automobile operated by another such officer, employee or member.

Privately Owned Automobiles - Continued

- (f) Ferry, bridge or toll road charges may be claimed except where reimbursement is on a train fare basis; in cases where mileage is allowed, such charges shall be allowed in addition to mileage.
- (g) Where reimbursement is claimed on a mileage basis, reasonable charges may be allowed for necessary parking while on State business for:
1. Day parking when on trips away from the headquarters office and residence. Day parking adjacent to claimant's headquarters, provided that claimant had other reimbursable private car expenses for the same day. (Effective 4/5/57 B/C 718h)
  2. Overnight public parking when on trips away from the headquarters city and city of residence. Claim should not be made if expense-free overnight parking is available. Parking charges shall be claimed on Form 263, together with claims for mileage.
  3. Parking charges at airports are not allowed.
- (h) Repairs, tire, gasoline or other automobile expense items shall not be allowed for the use of the automobile.
- (i) Expenses arising from travel between home or garage and headquarters shall not be allowed. Where a trip is commenced or terminated at claimant's home, the distance traveled shall be computed from either his headquarters or home, whichever shall result in the lesser distance. (B/C Rule 718)

Instructions for State Pool Cars:

A request for a monthly Department of Finance assigned car must be made through the Division's Headquarters office. Business Services must send a complete statement of the facts surrounding the need for such assignment to the Department of Finance, Automotive Management Section, Room 5164, State Capitol. If the request is approved by the Department of Finance the garage concerned will be authorized to make the assignment.

State Garages will not release cars for monthly assignment without such authorization.

When any motor parts or repairs are necessary contact the State Garage where the car was obtained.

Tires and Tubes are obtained from the State Garage in San Francisco, Sacramento, or Los Angeles. Other areas during normal work hours, contact Garage where car was obtained by teletype, telephone (collect), or telegraph.

After normal business hours, in an emergency, buy tire and/or tube from any vendor, submit letter in duplicate stating all facts if emergency.

The repair of a tire or a tube, when a real emergency exists, may be charged on a credit card - also the installation of a tire.

EMERGENCIES ARE DEFINED AS:

"Locations" - where the State's regular contractors have no stock, or the distance is too great to purchase from contractor's regular stock locations because of time and expense which would be involved.

"Time"- purchases necessary after regular working day hours, between the hours of 6:00 p.m. and 8:00 a.m., when travel between these hours is required.

## Instructions for State Pool Cars (Continued)

The persons in charge at the State Garages are:

Mr. John Costigan - 639 Van Ness Ave., San Francisco  
UN 1-8700, EX 2056

Mr. Carl Almquist - State Bldg., Los Angeles  
MA 6-1515

Mr. George Lundsford - 5169 State Capitol, Sacramento  
HI 5-4711, EX 4851

Mr. Thomas Farmer - 2151 Berkeley Way, Berkeley  
TH 3-7900, EX 463

Please refer to Page 5, No. 12 of Form 271 in the glove compartment of the State car for detailed instructions regarding washing, servicing, and billing procedures for any repairs to State Pool cars.

### Credit Cards

Credit cards of the contract-holding company are kept in the glove compartment of each car and should be used at all times except in Sacramento where gasoline and oil should be obtained from the State Garage at 10th & O Streets, and Division of Highways Shop at 34th and R Streets. In Los Angeles, gasoline and oil should be obtained at the State Building if in the vicinity.

Gasoline and oil purchases are to be made only from vendor outlets of the company awarded the State contract.

Only regular grade gasoline may be purchased for gasoline-powered vehicles owned by the State, except for the following passenger vehicles, which may use premium fuels:

Buick	(all models)	Oldsmobile (1949 &
Cadillac	(all models)	new models)
Chrysler 8		Packard (all models)
Lincoln	(all models)	

## Instructions for State Pool Cars - (Continued)

No cash payments for gasoline for State cars may be claimed, unless it is an emergency purchase. If it is an emergency purchase, a receipt together with an explanation of the reason for the purchase should be attached to the claim and submitted to the State garage from which the car was obtained.

If an emergency, single damaged spark plugs (not complete sets) light bulbs, fan belts, gas and radiator caps, wiper blades, battery cables, valve cores and caps may be purchased on the credit card. See instructions on the reverse side of the credit card for other supplies and services which may be obtained on the Chevron Credit Card. Everything else must be obtained from the State Garage.

Batteries are to be obtained from the State Garage in San Francisco, Sacramento or Los Angeles. Other areas during normal working hours, contact by teletype, telegraph or telephone the State Garage from which the car was obtained. Turn in the old battery to State Garage or vendor in lieu of installation charge. If an emergency, rent a battery.

### Service in State Garages

Twenty-four hour daily service will be maintained at the Sacramento State Garage for parking, minor mechanical repair and for supply of gasoline, oil, water, and air for State-owned vehicles. The San Francisco and Los Angeles parking lots will be open five days per week 7:30 a.m. to 6:00 p.m. Monday through Friday. The Los Angeles State Garage, in the basement of the State Building, is open six days per week, 7:00 a.m. to 10:00 p.m. Monday through Friday and 7:00 a.m. to 12 noon on Saturday. Access at other times can be obtained by contacting the State Police. (F/SAM 4125.5)

### PL 550 Operators of State Pool Cars

All drivers from Apprenticeship Standards operating pool vehicles under "PL 550" must indicate on pool ticket.

Instructions for State Pool Cars - Continued

Lubrication, oil changes, wash jobs, minor adjustments or repairs to State cars may be authorized by the driver.

A heavy duty type (detergent) oil will be used in State-owned automotive equipment, and will be purchased from contract sources to include the current service station contract, Department of Finance garages, or any other State sources securing the oil on the bulk contract.

Lubricating oil purchases will be in compliance with the annual contract terms with the following excepted circumstances.

1. In connection with a repair requiring the draining of oil.
2. With credit cards that have been authorized by the Department of Finance because the contracting company facilities are not available in certain areas.
3. If the available facilities of the contracting company will not accommodate outside vehicles.
4. Purchases from State facilities.

If purchases not in conformity with the contract terms or these exceptions are made, the officers and employees who purchase the oil will be required to personally pay the difference between the contract price and price billed to the State. (F/SAM 3689.1).

As prescribed by the Department of Finance, washing of State cars is not to exceed \$1.50 for each washing or a total of \$2.00 per month.---In Sacramento, State cars may be washed at the State Garage for \$1.00.

Instructions for State Pool Cars (Continued)

Automobile Travel Log (Form #A-300)

The maintenance of a Travel Log for each automobile is required by the Department of Finance.

This form is designed so that no other automobile report form is necessary except the Automobile Maintenance Record, Form 271, in which lubrications, oil changes and repairs are recorded.

This Travel Log must be maintained on a day-by-day basis with a line entry each day the car is used.

"Driver's Signature" - A signature is required for each line entry or implied by the use of ditto marks where the car is used all month or a substantial portion of the month by one driver.

Where more than one driver uses the car, an entry shall be made by each driver.

All Blocks Must be Filled in with the exception of the lower right corner -- date and mileage of services.

The white original will be sent at the end of each month to the pool from which the car was dispatched. The yellow copy may be retained for driver and division use. The triplicate remains with the Travel Log book in the car.

The following explanation of the items on the report is intended to clear up any misunderstanding and to assist in uniformity of reporting:

"Date" - Only 27 trip entries are provided on the form. Normally this should be enough due to non-working days, etc., but in some cases it may be necessary to run over onto another page.

Instructions for State Pool Cars - (Continued)

"Starting Mileage" - Only the starting mileage is shown since it is assumed that the ending mileage of each trip or day will correspond to the starting mileage of the succeeding trip or day - except in cases of pool cars when ending mileage must also be shown. If an employee makes several trips in one day within a city, starting and ending time and mileage for the day only need be shown. If two distinct out-of-town trips are made in one day each trip must be entered separately.

"Travel From" and "Travel To" - These items may cause some confusion, particularly where the trip ends at the starting point. Some acceptable examples are given here to cover this particular case:

San Francisco - - - - - and vicinity  
San Francisco - - - - - San Jose & return

"Depart Time" and "Arrive Time" - These items must be shown covering the day's use of the automobile, or the trip in case of pool cars. The time is of importance to the Department of Finance, particularly when the time is before or after the normal working hours. Be sure to note whether AM or PM.

"Storage, etc." - If the car is away from headquarters on a trip and stored for the night at the city or town shown as "Location" under "Travel To", such an entry as "Garage", "Parking Lot" or "Street" is sufficient, or as in Sacramento, "State Garage". If the car is stored at your home, or if you have been authorized to rent garage space near your home (not a public garage) the exact address must be shown. If facilities are provided in a public garage for regular storage show: "Sixth Street Garage", "Lee Monty Garage" or other facility as provided. For days when the car is not used (Saturdays, Sundays, etc.) it will be assumed that storage was the same as the night of last use. If it is not, an entry should be made.

## Instructions for State Pool Cars - (Continued)

### State Owned Automobiles

State owned automobiles shall be used for State business only. (B/C Rule 719) This point cannot be too strongly emphasized. Employees must be aware at all times that their actions are subject to public scrutiny. Improper use of State cars may be cause for discipline under the Civil Service Act.

### Taking Car Home at Night

When an employee leaves early in the morning and finds it difficult to arrange for other transportation, it is permissible to take a State car to his home the night before if approved in advance by his supervisor. The car may also be taken home on the return trip if the arrival is after working hours. If possible, cars should not be left out all night.

No employee, except as authorized above, may take a State automobile to his home and keep it over night unless given prior permission.

### Travel Costs in State Automobiles

The traveler to whom the State automobile is assigned and who is claiming the automobile expense should indicate the State car license number on his expense account. The traveler or travelers who ride in a State car assigned to someone else, should indicate "Traveled in State Car E (License #) with (Traveler to whom car was assigned)."

Charges for necessary "day parking" of State owned automobiles may be allowed. Garage charges for the storage of these cars shall be allowed up to and including \$1 without a receipt. Charges over \$1. must have a receipt attached.

Instructions for State Pool Cars - (Continued)

Overnight Parking Charges

Charges may be incurred for overnight parking when the automobile is used on a trip away from the operator's headquarters. (F/SAM 4125.4)

All charges for purchases and repairs for State Pool Cars not on a credit card, are billed to Department of Finance State Garage from which car was obtained.

## TODAY I WILL DRIVE SAFELY

There are approximately 7,625,000 automobiles registered in California today. With this great number traveling California highways, and accident statistics continually rising, it is especially important that the slogan "Today I Will Drive Safely" be kept in mind at all times when driving. In order to minimize accidents the following regulations shall apply to all officers and employees when driving a State car:

- Driving safely necessitates driving "Defensively". Driving "Defensively" means to so operate the car that no matter what mistakes the "other fellow" makes you still neither hit him nor let him hit you.
- Be courteous. Remember you are a public employee driving public property.
- Do not exceed stated speed limits.
- In wet weather, on rough roads or slippery road surfaces, always reduce speed to a safe driving minimum.
- In heavy traffic do not cut in or take unnecessary chances in passing other vehicles. Remember it is better to arrive 10 minutes late than not to arrive at all.

### Liability for Negligent Operation

Under Section 400 of the Vehicle Code (1939-1020; 2823) the State is responsible to every person who sustains any damage as a result of the negligent operation of an automobile by a State officer, agent or employee when he is acting within the scope of his office, agency or employment. The contingent liability imposed by Section 400 has possibilities of reaching the unauthorized use of State owned automobiles for other than official business. In such an instance, the need for the State to avail itself of the further provisions of Section 400, authorizing the recovery of judgment against the officer, agent or employee responsible would necessarily be very positive.

### Prevention of Accidents

" . . . . . Accidents can be prevented if each officer and employee will adjust his driving within legal limitations as to speed, condition of weather, road surfaces and traffic . . . . . A recurrence of accidents which evidence bad driving habits or a lack of skill should result in the employee's being denied the use of State vehicles. When an accident occurs as a direct result of willful disregard of traffic laws and State regulations, it is suggested that the employee be appropriately disciplined under the Civil Service Act."

## INSTRUCTIONS FOR STATE POOL CARS

### Accidents with State Owned Automobiles

The Department of Finance issues a notice each year as to the Insurance Company with whom the State has contracted for motor vehicle insurance indemnifying the State against loss for personal injury and property damage to others.

A copy of this notice listing the name of the company together with various instructions will be found in the glove compartment of each of our automobiles.

Accidents resulting in injuries to persons other than employees or serious damage to the property of others must be immediately reported by telephone or telegraph to the nearest claims office of the insurance company. A card will be found in the glove compartment of each car listing the offices, locations and telephone numbers of the adjusting units of the insurance company.

If an officer or employee, while driving on official business, is involved in an accident and is injured, he will have the benefits accruing him under the Workman's Compensation Act. Form 67, Employer's Report of Industrial Injury, should be prepared at once. Secure these forms from your supervisor.

Generally, there is no recovery for a guest rider when involved in an accident. (See Section 403 of the Vehicle Code.)

## Accident Reports

All accidents involving State owned motor vehicles must be reported immediately on Form 270, Report of Automobile Accident, in quintuplicate. Your cooperation to the end that emergency reports must be made to the State's insurance carrier and formal report to the Department of Finance, will enable the State's insurance carrier to investigate the accident. Too much emphasis cannot be placed upon the requirement that all the information be furnished on the formal report. Every question should be answered and the report must be signed by the operator and approved by an authorized superior immediately following the accident.

One copy of Form 269 - "Accident Report Summary" will be found in the glove compartment of each car. This form was devised to assist the driver in securing all pertinent information immediately. Form 269 should accompany Form 270, Report of Automobile Accident, when it is submitted to Accounting Section.

No one not holding a valid driver's license may operate a State car.

INSPECTORS OF AUTOMOTIVE EQUIPMENT

SACRAMENTO

George Lunsford  
State Garage, 10th and O Streets  
Sacramento, California  
Phone: Gilbert 2-4711, Ext. 4851

LOS ANGELES

Carl L. Almquist  
State Building Garage  
Los Angeles, California  
Phone: Madison 6-1515, Ext. 2313

SAN FRANCISCO

John E. Costigan  
639 Van Ness  
San Francisco, California  
Phone: Underhill 1-8700, Ext. 2057

SAN BERNARDINO

Kenneth Bailey  
c/o California Highway Patrol  
1931 West Fifth Street  
San Bernardino, California  
Phone: 91141

UKIAH

Fred Burger  
c/o California Highway  
1091 South State Street  
P.O. Box 295  
Ukiah, California  
Phone: Homestead 2-2934

BAKERSFIELD

Ray Loring  
c/o California Highway Patrol  
U.S. Highway 99, P.O. Box 668  
Bakersfield, California  
Phone: Fairview 5-5824

BERKELEY

T. M. Farmer  
Berkeley Garage  
Public Health Bldg.  
2151 Berkeley Way  
Berkeley, Calif.

FRESNO

Sherman Doll  
c/o California Highway Patrol  
222 Belmont Avenue  
Fresno, California  
Phone: Amherst 8-4466

SAN DIEGO

Harold Kelly  
c/o California Highway Patrol  
1422 Sixth Avenue  
San Diego, California  
Phone: Belmont 3-6539

SAN LUIS OBISPO

Junius Taylor  
c/o California Highway Patrol  
P.O. Box 678  
San Luis Obispo, California  
Phone: Liberty 3-2181

REDDING

Henry Youd  
c/o California Highway Patrol  
U.S. Highway 99 South, P.O. Box 980  
Redding, California  
Phone: 1600

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