Use of University and Private Vehicles Policy Guidelines
# California State University
## University and Private Vehicles Policy Guidelines

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*March 2002*
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INTRODUCTION

The following represent the California State University's (CSU) policy guidelines regarding the use of vehicles on University business. Additional statements of CSU policy may be found in various Chancellor's Office memorandums issued from time to time. Questions regarding policy guidelines on the use of University and private vehicles on University business should be directed to the Office of Risk Management at (562) 951-4580.

Each campus is responsible for keeping current on any changes to CSU policy guidelines and California laws and regulations on the use of vehicles. Additionally, each campus is responsible for obtaining official driving records on its employees who use vehicles on University business from the Department of Motor Vehicles.

USE OF UNIVERSITY (CSU) VEHICLES

The campuses maintain University vehicles to provide transportation in the most effective, efficient, and safest way possible for University employees in the performance of their duties. The vehicles are to be used when cost savings can be realized. Public transportation is to be used in lieu of University vehicles when savings are thus effected.

University vehicles shall be used only in the conduct of University business. This means "only when driven in the performance of, or necessary to, or in the course of, the duties of University employment." No University officer or employee shall use, or permit the use of, any University vehicle other than in the conduct of University business.

Only University employees may drive University vehicles. The campus may not loan or lease a University vehicle to any non-state entity including CSU auxiliary organizations.

DEFINITION OF UNIVERSITY (CSU) EMPLOYEES

"University employees" are defined as those persons who have completed all prerequisites to CSU employment. This includes all CSU faculty, staff, and student assistants and persons on volunteer status (Job Class Code 0050).

Persons who are not "University employees," are not authorized to drive University vehicles. This includes students (unless appointed as volunteers).

Members of the Board of Trustees, as officers of the University, are authorized to drive University vehicles.

DEFINITION OF UNIVERSITY (CSU) VEHICLE

A University vehicle is defined as a motorized device for land transportation owned, leased, or rented by the University, State or any State agency.
MOTORCYCLES

Motorcycles shall not be used in carrying out University or State business, except for police motorcycles as approved by campus president.

PARKING

A University vehicle may be parked at the University employee’s home only when the vehicle is to be used in the conduct of University or state business the same day or on the next succeeding workday as defined below.

Parking overnight at a University employee’s home is permissible when an employee is departing on or returning from an official trip away from the employee’s headquarters under circumstances which make it impractical for the employee to use other means of transportation, or where the employee’s home is reasonably en route to or from his/her headquarters or other place where he/she is to commence work the following day. When such situation occurs, the vehicle shall be parked off the street where feasible, or where the hazards of accidental damage, theft, and vandalism are reduced.

MISUSE OF UNIVERSITY VEHICLES

The following conditions are considered to be a misuse of University vehicles:

• Driving a University vehicle without authorization by proper University officials.

• Driving without valid California or other State operator’s license of the appropriate class for the type vehicle being driven.

• Permitting a person who is not a University employee to drive a University vehicle.

• Engaging in unsafe practices, including failure to use and to ensure that all passengers use all available safety equipment in the vehicle being operated. Safety equipment includes seat belts and/or shoulder harnesses.

• Falsification of travel logs, travel authorizations, defensive driver training program certificates, accident reports, or other forms relative to the use of the vehicle.

• Improper storage or parking of University vehicle.

• Personal use or conveying passengers other than persons directly involved with University or State business, except with the approval of employee’s immediate supervisor.

• Failure to comply with any law, regulation, or policy regarding the use of University vehicles, including the requirement to have satisfactorily completed a University approved defensive driver training course.

Employees misusing University vehicles may be personally liable for damages to persons or property caused third parties and the legal expenses of defense since employees act outside of
the course and scope of their employment during the misuse. Employees who misuse are also subject to disciplinary action by the University.

CAMPUS RESPONSIBILITIES

AUTHORIZATION TO USE UNIVERSITY VEHICLES - The campus has responsibilities concerning University vehicles. Each campus management is responsible for determining who meets the qualifying definition of a University employee and who will be authorized to drive on official University or State business and the types of vehicles they are qualified to use.

CONTROL - It is necessary for the campus to establish one point of control in order to:

- Fulfill the maintenance, safety and seat belt requirements.

- Control usage in accordance with Federal, State of California, CSU, and campus laws, regulations, policies, and procedures.

- Verify and maintain all required logs.

- Ensure prompt reporting of motor vehicle accidents and a post-accident review by a safety coordinator and/or supervisor (this includes completion of the Supervisor's Report of Vehicle Accident, STD 274 – Appendix A-4).

- Issue instructions and guidelines and clarify all relevant laws, regulations, policies, and procedures.

USAGE VIOLATIONS - It is the responsibility of the campus to control and regulate misuse. When misuse is discovered, it is the responsibility of the campus to determine the cost and send notification to the Executive Vice Chancellor/Chief Financial Officer and the Vice Chancellor for Human Resources.

Recovery of the cost of misuse is not to be considered a disciplinary action. The campus administration will determine what disciplinary action, if any, is appropriate.

CRITERIA FOR USAGE - The campus control office must determine that the following criteria have been met before releasing a University vehicle to an employee or authorizing an employee to use a private or personal vehicle on official University or State business:

- The person requesting vehicle use is, in fact, a University employee in active, State-funded pay status or in Job Class Code 0050.

- Written approval of the use has been given by an individual authorized by the president to grant such approval.

- The campus has requested a copy of the person’s driving record from the Department of Motor Vehicles at least once every four years and it is judged by the campus that the person has a good driving record.

- The person has satisfactorily completed a CSU approved defensive driving course and
maintains a good driving record. If the person has not completed such a course, a nonrenewable, temporary permit to drive a University, private or personal vehicle that is valid only until the next course is offered locally may be granted. A person who drives no more often than once a month need not complete such a course.

• The person has a valid California or other State driver’s license in his/her possession. The driver's license is of the correct class for the type of vehicle he/she is driving.

• A visiting Professor from another country here for more than six months must have a valid United States driver’s license in their possession in order to drive a State vehicle. Anyone who does not have a valid United States driver’s license should contact the Office of Risk and Insurance Management in Sacramento.

• The campus has ensured that the driver is familiar with all applicable changes to the California Vehicle Code.

• The following certification shall be required before an employee is authorized to drive a University vehicle or private vehicle on University or State business. This certification shall be made each time the employee accepts the keys to a University vehicle from the control office.

"I am in possession of a valid California or other State driver's license. I certify that I have not been issued more than three moving violations or have been responsible for more than three accidents (or any combination of more than three thereof) during the past twelve month period."

Signed: ______________________________________________

DRIVING RECORD - When driving records raise doubt as to a person's ability to drive safely, permission to drive on University and State business should be declined. When a person has been involved in accidents or has received traffic citations in such numbers or of such gravity as to be a matter of concern, his/her driving record must be obtained from the Department of Motor Vehicles for re-evaluation. Similar action must be taken if there are other indications of driving problems and/or the control office concludes that the driver should be re-examined. Continuation of authority to drive on University or State business depends upon evaluation of the report from the Department of Motor Vehicles.

AUTHORIZATION TO USE PRIVATELY OWNED VEHICLES - Management at each campus has the responsibility for authorizing persons to drive privately owned vehicles to conduct official University or State business. This responsibility may be delegated to the lowest practical supervisory level at which proper controls can be exercised.

Before a person may be authorized to use a privately owned vehicle to conduct University or State business, the person must certify in writing that the vehicle used will always be:

• Covered by liability insurance in at least the following amounts:
  —$15,000 for personal injury to, or death of, one person,
  —$30,000 for personal injury to two or more persons in one accident, and
  —$5,000 for property damage;

• Adequate for the work to be performed;
• Equipped with safety belts in operating condition; and

• In safe mechanical condition as required by law.

This certification will be recorded on Std. Form 261, Authorization to Use Privately Owned Vehicles on University or State Business. (See Appendix A-1)

The completed authorization form shall be retained by the supervisor empowered to approve the use of privately owned vehicles.

Authorization forms will be valid for a period not to exceed one year. Once completed, Std. Form 261 may be initialed and dated annually by the employee to certify that it is current. (See Appendix page A-1)

The supervisor shall verify that there is a fully executed current authorization form on file before signing a Travel Expense Claim, Std. Form 262 (Appendix A-2), for the claimant. This will assure that the person is aware that the coverage must be provided by the person's insurance rather than through any State sponsored insurance program. The person's signature on the Travel Expense Claim shall certify that the minimum insurance and safety requirements were in effect and had been properly recorded before the privately owned vehicle was used.

Each person who plans to drive a privately owned vehicle should be aware that the liability coverage maintained by the State is only applicable to that liability of the person which is over and above the liability insurance maintained by the person. Further, the State may be liable for damage for use of a motor vehicle by a State employee acting within the scope of State employment (Vehicle Code Section 17001).

The normal practice of insurance carriers is to allow the occasional use of privately owned vehicles on business trips without an increase in premium rates. If the privately owned vehicle is used consistently on State business, the person should contact the insurance carrier who may change the premium class with a corresponding increase in premium rate.

**INFORMATION TO BE PROVIDED TO THE DRIVER** - The control office is responsible for providing the driver of a University vehicle with the following information:

• The procedures for emergency repair and for reporting accidents.

• Proper storing and parking procedures for University vehicles.

• The correct gasoline and oil to be used in the vehicle.

• What constitutes misuse, including failure to use seat belts and/or shoulder harnesses.

• That monthly logs must be filled in completely for each trip, regardless of the duration, miles driven, or the purpose; if the trip is longer than one day, a new entry for each day must be made.

• That all necessary documents are in the glove compartment of each vehicle. (It is the responsibility of the control office to insure that a current copy of all necessary handbooks, accident report forms (STD 269 – Appendix A-3, and travel logs, etc., are in the glove compartment of each University vehicle.)
• That dogs may not be transported in University vehicles, with the exception of a seeing-eye or service dog accompanying a passenger.

• That University employees may not pick up hitchhikers in a University vehicle.

The campus control center may decide upon further restrictions for which the employee driver will be equally responsible.

CHARGE CARDS - The same review for using University vehicles must be made by the campus before issuing General Services Charge Cards, since the charge card permits access to vehicles in the State motor pools and rental vehicles.

NOTE: Only the General Services (blue) charge card or the State of California American Express card should be used to rent vehicles from rental car agencies with whom the State has a contract. Use of these cards activates liability coverage provided by the rental car company as part of its agreement with the State of California. Use of other charge cards will result in the employees personal coverage being used as primary coverage, with the State Vehicle Liability Program as secondary coverage.

CREDIT CARD PURCHASES - The campus business office must review credit card purchases and insure that unauthorized purchases are recovered.

REMINDER STICKERS - Cars are to have reminder stickers in appropriate locations for such purposes as ensuring use of seat belts, use of appropriate oil and gasoline, non-smoking, etc.

MOTOR VEHICLE ACCIDENTS - University employees involved in an accident while driving a State-owned vehicle, or a privately owned vehicle on official University or State business, will make no comment or statement regarding the accident to anyone except police, other State officers or employees, or an identified representative of the State's contract adjuster.

Subsequent to any accident involving a University or State-owned, or rental vehicle, or a privately owned vehicle driven on official University or State business, all communications regarding claims, including summons and complaints, must be forwarded immediately to the Office of General Counsel in the Chancellor’s Office and the Office of the Attorney General of the State of California, with a copy to the Office of Risk and Insurance Management, Department of General Services for disposition. The transmittal letter should include the date and place of service, together with any other pertinent information.

REPORTING VEHICLE ACCIDENTS - The driver of a University or State-owned or rental vehicle involved in an accident will record all pertinent information on the Accident Identification Card, Std. Form 269 (Appendix A-3), before leaving the scene of the accident. If another vehicle is involved, the appropriate portion of the Std. Form 269 (Appendix A-3) will be detached and given to the driver of the other vehicle. Blank Accident Identification Cards should be found in the glove compartment of each State-owned vehicle.

All vehicle accidents which result in injury to any person other than University employees, or which involve serious damage to the property of others must also be reported immediately by telephone (916-376-5300) or FAX (916-376-5277) to the State Office of Risk and Insurance Management in Sacramento.
Additional instructions are shown on the Std. Form 269 (Appendix A-3). University employees involved in a vehicle accident will comply with those instructions and retain the card for review by the supervisor and as an aid to the completion of other accident reporting forms. (Std. Form 270 – Appendix A-4)

**REPORT OF VEHICLE ACCIDENT, STD. FORM 270** (Appendix A-4) - All motor vehicle accidents involving a State-owned vehicle or any vehicle being used on State business must be reported within 48 hours to the Office of Risk and Insurance Management (ORIM) at 707 Third Street, First Floor, Sacramento, CA 95798-9052, utilizing Standard Form 270, Report of Vehicle Accident (Appendix A-4).

If the accident resulted in bodily injury or significant property damage to a non-state party, the accident must be first reported by telephone at (916) 376-5300 or by a preliminary copy of the STD. Form 270 (Appendix A-4) sent by FAX at (916) 376-5277.

Reporting the accident by telephone or FAX does not replace the need to send the STD. Form 270 within 48 hours.

If an accident involving bodily injury or significant property damage occurs on a weekend, call (916) 376-5295 and leave a voice mail message. The caller will be contacted on the next business day for more details.

For Department of General Services, Office of Fleet Administration “pool” vehicles only, a STD. Form 269 (Appendix A-3), Accident Identification Card, and a STD. Form 270 (Appendix A-4) can be found in the glove compartment.

The ORIM has contracted with a private adjusting company to conduct accident investigation and adjusting services upon the ORIM’s request. Employees contacted by a representative of this contractor may verify that they have been retained by ORIM by calling (916) 376-5300.

If an accident occurs that results in bodily injury and/or significant property damage to a State or non-state party, in addition to the reporting to ORIM, a copy of the report should also be forwarded to the Office of General Counsel and the Office of the Risk Management in the Chancellor’s Office.

When a State vehicle is struck while parked unattended and the damage is under $1,000.00, and the name (or license number) of the party causing the damage is unknown, no Std. Form 270 (Appendix A-4) need be completed; in similar cases where the damage is over $1,000.00, the custodian of the vehicle will complete only that portion of Std. Form 270 (Appendix A-4) listing identification of custodian and vehicle, location, and time damage probably occurred, and signature.

The immediate supervisor who authorized or permitted the employee to use the vehicle will ensure that the employee completes the Std. Form 270 (Appendix A-4) or will do it for him/her if the employee is unable to do so. The supervisor will also inform the Auto Liability Self Insurance Unit (Office of Risk and Insurance Management) when the employee is unable to do so. (See SAM Section 2440 for other responsibilities of the supervisor in regard to vehicle accidents.)

**DISTRIBUTION OF STD. FORM 270** (Appendix A-4) - The completed Std. Form 270 (Appendix A-4) is distributed in one of three ways depending upon the type of vehicle in use by the University employee at the time of the accident. Distribution will be as follows:
STATE POOL VEHICLE - Where a State pool vehicle is involved, the University will send the original of Std. Form 270 (Appendix A-4) to the Office of Risk and Insurance Management, Department of General Services, and a copy to the State garage from which the vehicle was dispatched. The garage copy is required to show what vehicle repairs are necessary. A copy should be forwarded to the Campus Vehicle Coordinator to be used to compile statistical reports and to use in accident prevention activities. The campus will be notified of the total cost of repairs. This information may be used to obtain reimbursement from a University employee driver when misuse of the vehicle is involved.

CSU-ASSIGNED STATE VEHICLE AND CSU-OWNED VEHICLE - For CSU-assigned State vehicles, the CSU will send the original Std. Form 270 (Appendix A-4) to the Office of Risk and Insurance Management, Department of General Services; additional copies will be retained for campus and Chancellor's Office use and accident statistics required by the Governor's Safety and Workers' Compensation Program.

Note: The STD Form 270 (Appendix A-4) is now available on the ORIM website: www.orim.dgs.ca.gov (click on publications).

PRIVATELY OWNED VEHICLES - An accident that involves a privately owned car or commercial automobile rental being driven on University or State business will be reported on Std. Form 270 (Appendix A-4). The report should be clearly marked "Privately Owned Vehicle Involved" or "Rental Vehicle."

The original of the form should be sent to the Office of Risk and Insurance Management, Department of General Services; a copy is retained by the campus with an additional copy retained by the University employee-driver.

SUPERVISOR’S REVIEW - The supervisor of each driver involved in an accident will take the following actions:

• Investigate each accident promptly and thoroughly.

• The immediate supervisor who authorized or permitted the employee to use the vehicle will ensure that the employee completes the Std. Form 270 (Appendix A-4) or will do it for him/her if the employee is unable to do so. The supervisor will also inform the Auto Liability Self Insurance Unit (Office of Risk and Insurance Management) when the employee is unable to do so. (See SAM Section 2440 for other responsibilities of the supervisor in regard to vehicle accidents.)

• Prepare a Supervisor's Review of State Driver Accident, Std. Form 274 (Appendix A-5), or an equivalent report. (It is recommended that the agency copy of the completed Std. Form 270 - Appendix A-4 be used for reference when preparing a Std. Form 274 – Appendix A-5.)

• Initiate any appropriate corrective action, verbal or written, and record corrective action taken in departmental personnel records.

• Forward copies of the completed form as directed by campus administration.
The purpose of Std. Form 274 (Appendix A-5 or equivalent report) is to aid in preventing University employee driver accidents. It will be used to determine if the accident was avoidable and what actions the driver should have taken to avoid the accident. It will also be used to determine specific needs for accident prevention training and in the establishment of administrative policy.

**USE OF POLICE ACCIDENT REPORTS** - A supervisor who is investigating a University or State vehicle accident is an "interested party" and is entitled to read, and make notes from, police reports. Such reports will usually be on file within 48 hours at the office of the police agency that has jurisdiction over the place of the accident. For accidents occurring outside incorporated areas, contact the California Highway Patrol; for those within cities, contact the local police department.

Copies of University vehicle reports made by the Highway Patrol may also be obtained by written request to the California Highway Patrol, nearest to the accident scene. There is no charge for this service. If the investigating supervisor thinks it advisable, he/she may contact the investigating officer through the Highway Patrol Area Commander, or through the office in charge of the local police department traffic unit.

**MOTOR VEHICLE LIABILITY INSURANCE** – A Vehicle Liability Self Insurance Claims Unit has been established within the State Office of Risk and Insurance Management, Department of General Services, to respond to claims of bodily injury and/or property damage of others, which occur during University use, operation or maintenance of self-propelled land vehicles. Evaluation and payment of claims will be made by the Office of Risk and Insurance Management following statutory provisions of Sections 17000 and 17001 of the California Vehicle Code and other laws applicable to claims against the State of California. This program protects any officer or employee of the University against all motor vehicle liability claims while operating a State-owned vehicle in the course and scope of employment.

When university employees rent a vehicle under the State of California car rental agreement negotiated by the State, they are covered by an insurance policy provided by the car rental agency as a provision of the State contract. Employees who are involved in an accident while driving a State contract rental car must complete the Standard Forms 270 (Appendix A-4) and 274 (Appendix A-5).

An employee's personal automobile insurance policy is the primary coverage for liability and damages in the event of an accident while on State business under the following circumstances:

- The employee has failed to obtain a “non-availability" slip from the State contract vehicle agency before proceeding to a non-state contract rental agency.

- The employee is driving his/her personal vehicle (whether or not a motor-pool vehicle was available).

- The employee has rented a vehicle from an agency other than the State vehicle contract agency.

An employee may seek relief from out-of-pocket expenses such as deductibles from the Victims Compensation and Government Claims Board (formerly known as the Board of Control).
The Vehicle Liability Self Insurance Unit does not provide for loss or damage to vehicles owned by the CSU or State or to privately owned vehicles used on CSU or State business. It is designed to provide reimbursement to third parties only (when an accident is the fault of the State driver) and not State or University employees, their vehicles and University and State vehicles.

Claims paid by private insurance for accidents to privately owned vehicles while being operated on University or State business are not reimbursable from CSU or State funds.

The Office of Risk and Insurance Management has agreed to pursue the party responsible for the accident to recover the CSU's costs of repairs. Copies of the repair invoices, and any other expenses, should be forwarded as soon as possible to their office at 707 Third Street, First Floor, Sacramento, California 95798-9052, Attn: Claims Manager.

REPAIRS TO CSU-OWNED VEHICLES - Whenever possible, minor repair of CSU-owned vehicles will be performed in campus automotive service shops. NOTE: The campus Vehicle Inspector's approval is required on any repair where the parts costs exceed $350 or when replacement of the vehicle may be a consideration.

For commercially performed repairs which will cost $350 or more, three estimates must be obtained. (If three estimates are not obtainable, an explanation should be retained in the vehicle repair file.) Preferably, one of the estimates should be from an authorized dealer for the make involved.

Estimates will quote flat rates on labor for parts replacement and net prices on parts, when applicable, for comparable jobs or job elements. Where parts are to be repaired or straightened rather than replaced, estimated time costs are acceptable. All costs must be itemized.

Each estimate will be submitted in triplicate to the campus Vehicle Inspector, who will make the award to the estimator who has included all the work required to repair the vehicle, not necessarily the lowest bidder. If hidden damage is found after the vehicle has been dismantled, the inspector may authorize any necessary additional cost.

The accepted estimate is distributed as follows:

- The original is attached to the invoice.
- One copy is retained in the campus vehicle repair file.
- In accident cases, a copy is furnished to the Office of Risk and Insurance Management, Department of General Services.

WARRANTY INSPECTION AND REPAIRS - All CSU-owned vehicles should be inspected for parts that show defects in material and/or workmanship in time to take full advantage of manufacturer's warranty replacement provisions before their expiration. The Owner's Manual supplied with each new vehicle contains the warranty coverage for that vehicle. The first 12,000-mile preventive maintenance service should be performed prior to expiration of warranty, i.e., before the speedometer has reached 12,000 miles or the vehicle has been in service one year, whichever comes first.
Manufacturers occasionally initiate changes during the model year to be applied retroactively. When notified of such changes, the campus shall ensure that they are made by the authorized dealer at no cost to the CSU.

**OPERATOR INSPECTION** - The operator of a vehicle also has an obligation to inspect the vehicle before driving it. The vehicle should be checked visually to assure that such items as the tires are in good condition and adequately inflated, that the side-view mirror is usable, that there is a gas cap, spare tire, and a jack. The brakes, lights, and other controls should be tested for satisfactory performance.

Problems noticed by the operator while using the vehicle should be noted on a Trip/Daily Operator Checklist, which should be kept in the vehicle.

Cooperation of the operators of CSU vehicles is an important supplement to the routine periodic inspections, as it helps forestall problems during subsequent use and helps minimize maintenance problems.
## Appendix A-1

In accordance with State Policy S.A.M. 0730.0073, approval is required to use privately owned vehicles to conduct official State business.

I hereby certify that, whenever I drive a privately owned vehicle on State business, I will have a valid driver’s license and proof of liability insurance in my possession, all persons in the vehicle will wear safety belts and the vehicle shall always be:

1. Covered by liability insurance for the minimum amount prescribed by State Law (15,000) for personal injury to or death of one person; $30,000 for injury to, or death of, two or more persons in one accident; $5,000 property damage. Vehicle Code Section 16002 (effective July 1, 1985) requires 40 hours in core courses of current available liability insurance in these vehicles.

2. Adequate for the work to be performed.

3. Equipped with safety belts in operating condition.

4. To the best of my knowledge, in safe mechanical condition as required by law.

I understand that the mileage reimbursement for the cost of operating the vehicle, including fuel, maintenance, repairs and both liability and comprehensive insurance.

I further certify that, while using a privately owned vehicle on official State business, all accidents will be reported on Form STD 270 within 48 hours (S.A.M. 2445).

I understand that permission to drive a privately owned vehicle on State business is a privilege which may be suspended or revoked at any time.

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<th>STATE</th>
<th>EXPEDITION</th>
<th>DATE</th>
<th>EMPLOYEE'S SIGNATURE</th>
<th>STATE</th>
<th>EXPEDITION</th>
<th>DATE</th>
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### II. APPROVAL

Use of a privately owned vehicle on State business is approved.

<table>
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<tr>
<th>APPROVING AUTHORITY NAME</th>
<th>TITLE</th>
<th>DATE APPROVED</th>
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### III. RENEWAL

I have reviewed the above certification and approval and certify that the information provided is correct and valid.

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## Travel Expense Claim

**State of California**

**TRAVEL EXPENSE CLAIM**

Use Instructions and Priority Statement on Reverse Side

**OFFICE:**

**DATE:**

**TRAVELER:**

**PURCHASE ORDER NUMBER:**

**TRAVELLOR’S NAME:**

**EMPLOYEE NUMBER:**

**DIVISION/DEPARTMENT:**

**TELEPHONE NUMBER:**

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<th>LOCATION</th>
<th>MEALS</th>
<th>C/O COST</th>
<th>COLLECTED OR INCURRED</th>
<th>TOTAL EXPENSE</th>
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**SUBTOTALS**

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**CLAIM TOTAL**

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<tr>
<th>PURPOSE OF TRIP</th>
<th>DEPARTURES AND DETAILS (Attach separate sheet if necessary)</th>
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**AGENCY ACCOUNTING OFFICE**

**USE ONLY**

**PAY BY ORDER BY CHECK NUMBER**

<table>
<thead>
<tr>
<th>CLAIMANT’S SIGNATURE</th>
<th>DATE</th>
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**OFFICE: USE ONLY**

**PURCHASE ORDER NUMBER**

**TRAVEL CLAIMER’S SIGNATURE**

**DATE**
STATE OF CALIFORNIA
TRAVEL EXPENSE CLAIM
STATE FISCAL LAW

INSTRUCTIONS

Submit your claim to be reimbursed for travel and out of pocket expenses incurred in the performance of your official duties. The travel expenses must be justified and documented. Expenses are reimbursable as per California State Administrative Code (Title 2) and official State Administrative Code. Submit your claim to the appropriate department for approval. Any exceptions or deviations from the regulations must be approved in writing by the appropriate authority. Claims must be submitted within 30 days of the expiration of the travel period. The claim must be submitted to the agency or department that issued the travel authorization.

MULTIPLE STAGES: Each stage of the claim process must be completed and submitted within the time frames specified. Attach supporting documents such as receipts, invoices, and travel itineraries. The claim must be submitted in the manner specified by the appropriate authority. Claims must be submitted within 30 days of the expiration of the travel period. The claim must be submitted to the agency or department that issued the travel authorization.

CLAIM TOTAL: The total amount claimed must be supported by documentation such as receipts, invoices, and travel itineraries. The claim must be submitted in the manner specified by the appropriate authority. Claims must be submitted within 30 days of the expiration of the travel period. The claim must be submitted to the agency or department that issued the travel authorization.

COLUMN ENTRIES

1. DATE
2. VEHICLE
3. MILEAGE
4. PURPOSE
5. PAYEE
6. ITEMIZED EXPENSES
7. TOTAL EXPENSES
8. REMARKS

INSTRUCTIONS

1. COMPLETE ALL ENTRIES IN THE SPACE PROVIDED.
2. ATTACH ALL SUPPORTING DOCUMENTS.
3. SUBMIT THE CLAIM IN THE MANNER SPECIFIED BY THE APPLICABLE AUTHORITY.
4. SUBMIT THE CLAIM WITHIN 30 DAYS OF THE EXPIRATION OF THE TRAVEL PERIOD.
5. SUBMIT THE CLAIM TO THE APPROPRIATE AUTHORITY.

OTHER INFORMATION

1. Attach all receipts and supporting documentation.
2. Submit the claim in the manner specified by the appropriate authority.
3. Submit the claim within 30 days of the expiration of the travel period.
4. Submit the claim to the appropriate authority.

PRIVACY STATEMENT

The Information Practice Act of 1977 (Civil Code Sections 1798 et seq.) and the Freedom of Information Act (Public Law 94-482) protect the privacy of personal information gathered.

AGENCY NAME: Department of the State Controller’s Office (SOC)

INSTRUCTIONS FOR MAINTENANCE: The Luggage Office must maintain a record of all items received. This record must be maintained for 30 days from the date of receipt. The Luggage Office must maintain a record of all items received. This record must be maintained for 30 days from the date of receipt.

AUTHORITY: The authority to authorize travel expenses is granted by the State Administrative Code (Title 2) and official State Administrative Code. Submit the claim in the manner specified by the appropriate authority.

PURPOSE: This information is necessary for the proper performance of the duties of the employee. This information is necessary for the proper performance of the duties of the employee. This information is necessary for the proper performance of the duties of the employee.
## State of California

### Reporting Automobile Accidents

The State administers a vehicle liability self-insurance program against loss for personal injury and property damage to others. The program protects any officer of employee of the State while operating a state-owned vehicle while on official business.

All vehicle accidents which in any way involve personal injury or property damage to others must be reported within 48 hours on Report of Vehicle Accident Form (RTD 270). The completed report must be signed by the operator and approved by the operator or his/her supervisor.

Accidents resulting in any injury to persons other than employees, or involving serious damage to the property of others, must be reported immediately by employee to the Office of Risk and Insurance Management or, in the absence of an RTD, 270 may be faxed to the ORIM.

**Do Not Discuss Accident with Anyone Except:**
- Investigating Traffic Officers
- Your Supervisor
- Authorized State Officers
- State's Insurance Contractors

Subsequent to any accident involving a State vehicle, all communications, forms, including Summation and Comments, must be forwarded to the Department of General Services, Office of Risk and Insurance Management, Sacramento. Transmittal memo should include date and place of special engineer with any other pertinent information, including name of person or agency served and date of service.

**Complete Entries on Accident Identification Card—Detach and Give to Other Driver**

### Accident Identification

#### Important

Complete within five (5) days to avoid citations.

- Attach report card to accident and give to other driver who may need information for financial responsibility form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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<tbody>
<tr>
<td>Driver’s Full Name</td>
<td>John Doe</td>
</tr>
<tr>
<td>Driver’s License Number</td>
<td>123456789</td>
</tr>
<tr>
<td>Driver’s Address</td>
<td>123 Main St, Anytown USA</td>
</tr>
<tr>
<td>Time and Location of Accident</td>
<td>10:00 AM, Anytown USA</td>
</tr>
<tr>
<td>Name and Date of State Vehicle</td>
<td>John Smith, 01/01/2023</td>
</tr>
</tbody>
</table>

#### Office of Risk and Insurance Management

- Sacramento, CA
- 1234 Main St, Suite 100
- Phone: 555-123-4567
- Fax: 555-123-4567
- E-mail: claims@ogsm.ca.gov

**NOTE:** This accident identification card (on reverse) should be filled out, detached and given to other driver.
EVIDENCE OF FINANCIAL RESPONSIBILITY

This vehicle is owned or leased by the State of California, a public entity and operated by employees or agents of the State. California Vehicle Code Sections 16000, 16020, 16021 et seq. state that ownership or lease of a vehicle by a public entity establishes evidence of financial responsibility.

REPORTING OF CLAIMS

In case of an accident resulting in injury to persons (other than employees), or involving serious damage to the property of others, call the Office of Risk and Insurance Management IMMEDIATELY (or FAX an advance copy of STD. 270, Vehicle Accident Report [a])

During normal working hours call:

OFFICE OF RISK AND INSURANCE MANAGEMENT
(916) 322-0459 (CALNET: 492-0459) or
1-800-800-3634 TOLL FREE
FAX (916) 322-6006

On weekends or holidays, call:

OFFICE OF RISK AND INSURANCE MANAGEMENT
(916) 322-8967 (or CALNET: 492-8967)
and leave a Voice Mail message (which will be returned on the next business day).
STATE DRIVER ACCIDENT REVIEW

STANDARDIZED DATA TALLY SHEET

PURPOSE: To have supervisor investigate each driver accident, report facts and circumstances, confirm that the State vehicle was used on State business, and initiate or recommend action to achieve accident prevention.

HOW: Use sources of information listed on the back of this form. Report on all accidents, regardless of who was hurt, what property was damaged, or who was responsible. Where State property is all that is damaged and repairs do not exceed $1,000, a STD. 270 should not be submitted to the Office of Risk & Insurance Management. (SAM 2403)

WHO: SUPERVISOR who authorized the employee to drive on State business must prepare this report, note the type of accident, and forward it to the reviewing officer/safety coordinator within five days from the date of the accident. Attach STD. 274 to the departmental copies of STD. 270 (if applicable). If STD. 270 is not required, send a copy of STD. 274 to the Office of Risk & Insurance Management, Loss Control Unit.

REVIEWING OFFICER: You are responsible for the quality, accuracy and completeness of the supervisor’s report and to initiate follow-up action.

1. DATE OF ACCIDENT
2. ORGANIZATION UNIT AND DEPARTMENT
3. SUPERVISOR’S NAME
4. HOW DID ACCIDENT OCCUR? (SUPERVISOR’S VERSION)
5. WHAT OTHER REGULATIONS, VEHICLES AND OR VIOLATIONS CONTRIBUTED TO THE CAUSE OF ACCIDENT?
6. SUPERVISOR’S ACTION TAKEN, OR RECOMMENDATIONS FOR SUPERVISOR TO PUT INTO EFFECT (SEE BACK FOR INSTRUCTIONS)

I CONCUR [ ] OR I DO NOT CONCUR [ ] WITH SUPERVISOR'S EVALUATION AND ACTION TAKEN

1. SIGNATURE AND TITLE OF SUPERVISOR
   DATE

2. HOW WAS THE FOLLOW-UP INFORMATION OF YOUR EVALUATION AND FOLLOW-UP ACTION VERBAL DISCUSSION [ ] WRITTEN MEMO [ ] VERBAL AND WRITTEN [ ]
   DATE

3. SIGNATURE AND TITLE OF REVIEWING OFFICER

A5
STATE DRIVER ACCIDENT REVIEW
STATE OF CALIFORNIA
DEPARTMENT OF MOTOR VEHICLES

SOME ACTION SUGGESTIONS AND RECOMMENDATIONS
(Explain on other side)

- Driver habits need to be observed in traffic
- Our driver was a contributing factor (mention to driver)
- Further training be provided (when, by whom, and topic)
- Departmental policy on local rules be modified
- Driver be disciplined (special action suggested)
- Ask accident review board to advise supervisor
- No further personnel action be taken
- Recommend personal from driving status
- Discuss cumulative driver record
- Recommend NVR or change of traffic flow
- Change or improve equipment
- Ask for expert consultation

GIVE DATE OF DEFENSIVE DRIVER TRAINING

DATE

- Orientation - Department Policies and Rules
- Classroom Defensive Driving Training
- Behind-the-Wheel Training
- Special Mobile Equipment Training

SUPERVISOR - CLASSIFY FOR DEPARTMENTAL REPORTING

TYPE OF VEHICLE ACCIDENT:

COLLISION WITH OTHER VEHICLE

- 1. Extreme maneuver
- 2. Lost control
- 3. Hit other vehicle in rear
- 4. Hit from rear
- 5. Proceeding straight
- 6. Crossed into opposing lanes
- 7. Changing lanes
- 8. Making right turn
- 9. Making left turn
- 10. Backing
- 11. Mechanical failure
- 12. Collision with bicycle

SOLO ACCIDENT

- 13. Extreme maneuver
- 14. Lost control
- 15. Collided with stationary object
- 16. Backing
- 17. Hit pedestrian
- 18. Lost control
- 19. Mechanical failure
- 20. Severe or was struck by animal

STRIKING PEDESTRIAN

- 21. In a crosswalk
- 22. Not in a crosswalk
- 23. While backing

MISCELLANEOUS ACCIDENT

- 24. Explan

WAS ACCIDENT PREVENTABLE BY STATE DRIVER?

Yes No