

PROFESSIONAL DEVELOPMENT/CONFERENCE REQUEST

1. Discuss this conference (goals and objectives) with your principal or immediate supervisor and have them sign their approval below. **Forward it to the Deputy Superintendent's Office for approval and processing.**

• IN ORDER TO PROCESS YOUR REIMBURSEMENT, EACH PERSON IS RESPONSIBLE FOR SUBMITTING A COMPLETED FORM.

2. Prepare your absence on AESOP with the appropriate information and indicate if a substitute is needed.
3. If requesting reimbursement, please prepare and submit the following to the Bookkeeping/Fiscal Office:

- A. Submit your current w9 Form
- B. Purchase Requisition
- C. Attached invoice (Form #Adm.-24)
- D. Copy of Approved Conference Request
- E. Attached Mileage Record Sheet
- F. All original receipts verifying cost of all expenses

DATE: _____

NAME: _____

ADDRESS: _____

POSITION: _____

DEPARTMENT/SCHOOL: _____

CONFERENCE YOU WISH TO ATTEND: _____

REASON FOR ATTENDING: _____

DATE(S) OF CONFERENCE: _____

LOCATION: _____

City State

FUNDING SOURCE (This must be completed):

Local Budget

Federal or State Project

Revolving Account

Other (LIST _____)

Name of Project

Name of Account

EXPENSES:

REGISTRATION: _____

TRAVEL: _____

MEALS: _____

OTHER (Hotel, etc.): _____

If no cost, please indicate N/C

TOTAL AMOUNT: \$ _____

82.50

APPROVED

DISAPPROVED

Supervisor/Principal

Superintendent/Deputy Superintendent

IN STATE REQUESTS MUST BE SUBMITTED TWO WEEKS PRIOR TO EVENT.

Point of Contact Checklist

For Conferences & Learning Academies with Course Reimbursement

Point of Contact: All conferences require a single Point of Contact (POC). The POC is responsible for compiling all required paperwork and submitting it to the appropriate AP office. If there is a conference with multiple attendees, the POC is responsible for submitting required paperwork and ensuring that all attendees are aware of the conference process. The POC must obtain approved Prof. Develop. Conf. Request forms, create the necessary Requisitions, and submit all paperwork (and subsequently post-conference paperwork) under one complete packet to Bookkeeping or Fiscal. [Web signatures are required on all forms.](#) *All forms are on the F&O webpage under the Useful Forms section.*

Before the Conference

STEP 1: Verification

- Verify the travel is restricted to necessary/critical activities only (should provide a public benefit)
- Verify that expenses are pre-budgeted and the account line that will be used

STEP 2: Approval

- Complete *Professional Development Conference Request Forms* for each staff member. Immediate supervisor must sign. If out-of-state, Superintendent must sign.

STEP 3: Requisitions. Create the applicable Requisitions.

- Requisition for Vendor Conference Registration**
 - Copy of registration fee
 - 30B Letter for Prof. Development & Training*
 - Approved Prof. Develop. Conference Request Form(s)*
- Requisition for Travel Agent (airfare, lodging, rental car)**
 - Approved Prof. Develop. Conference Request Form(s)*
 - Vendor quote
- Requisition for Reimbursement (for each employee)**
 - W-9 Form* (Oct. 2018 version only) of employee (if need to be updated in Munis)
 - Approved Prof. Develop. Conference Request Form*
 - 30B Letter for Prof. Development & Training*
 - If applicable, *Course Approval and Reimbursement Request Form* with registration confirmation, staff *Invoice Template*, and proof of payment

- **Calculate Reimbursement.** Requisition amount should be based on applicable expenses:
(Food Limit + Travel Expense Flat Rate + Course Fee)
 - **Food Limit:** A limit of up to \$60/day, later adjusted with receipts
 - **Travel Expenses:** A flat rate of \$100, later adjusted with receipts
 - If attendees carpoled, staff who did not drive cannot submit unwarranted mileage reimbursement request

STEP 4: Pre-Conference Submission

- Submit a single packet of all required paperwork outlined above to the appropriate AP office

During the Conference:

Staff Receipts

- Attendees must collect all related original receipts accumulated during the conference
- Must be in the individual staff member's name and should not include other staff purchases
- Must be submitted for each day of the conference to be eligible for payment
- Includes: Ubers, Lyfts, Scooters, Taxis, Trains, Subways, Parking.
- Receipts for travel must be printed out. For mileage, odometer readings should be logged on the *Mileage Record Sheet* or a printout of directions with mileage accrued should be submitted.
- Alcoholic Beverages are prohibited

After the Conference

STEP 5: Post-Conference Submission

- Immediately following the conference, collect:
 - Staff original receipts
 - *Mileage Record Sheets*
 - *Invoice Templates*
- Within 2 weeks post-conference, submit as a single packet to the appropriate AP office:
 - **Mileage:** *Mileage Record Sheets* and *Invoice Templates*
 - **Additional Expenses:** *Invoice Templates* with original receipts for food/additional travel must be neatly organized and attached
 - **Travel Agent Invoices:** must be signed in wet ink by POC

Reimbursement Procedure

- Must be within your budget
- Written approval is required prior to any purchase:
 - Wet signatures are required; stamped signatures are not accepted
 - **Department Heads, Principals, Directors, and Supervisors**: must interoffice approval requests on district letterhead to Finance & Operations for Asst. Supt.'s approval
 - **All other staff**: require an approval letter on district letterhead signed by their immediate supervisor
- Requisitions require:
 - Completed Requisition Form
 - Pre-approval letter from supervisor
 - Invoice Template (*found on F&O webpage under Useful Forms*)
 - Proof of payment (*i.e., credit card statement / check copy*)
- Travel:
 - A Purchase Order must be opened prior to travel
 - Receipts and proof of payment must be submitted afterward to apply to the open PO
- Food:
 - Is not reimbursable unless it is for conference that is offering a per diem for such purposes
 - Submit receipts and proof of payment after the conference

Reminder regarding school budgets: Personal reimbursements should be a limited practice. Reimbursement for personal supplies is discouraged. An open PO for an employee to personally buy items that may come up during the year is not permissible. Personal reimbursements should be almost exclusively for approved travel expenses not covered through the travel agency. Supplies should be ordered from a vendor. Open POs for reimbursement are rare, if allowable at all.