

REQUEST TO ATTEND CONFERENCE/ WORKSHOP/TRAINING

(Left Side of Conference Approval Form)

CONFERENCE/WORKSHOP REQUEST:

A RUSD CONFERENCE APPROVAL & REIMBURSEMENT form (LEFT SIDE) needs to be completed for each staff member wanting to attend a conference, workshops, or training. Completed form, any necessary Purchasing requisitions and all required backup must be submitted to Accounting at least **4 weeks** in advance of the event. **Paperwork submitted outside of the 4-week parameter may be returned.**

ATTACH BACKUP:

Required backup includes:

Conference brochure, workshop flyer, or other communication that includes date, location, cost, itinerary, vendor name, address, phone number and contact person. for the event.

Conference Worksheet detailing all anticipated expenses.

MapQuest or similar printout of anticipated mileage to & from the event.

Travel Confirmation if air/train travel is necessary

Lodging Confirmation if overnight stay is necessary

Registration Confirmation indicating registration process is complete

REQUEST TO ATTEND CONFERENCE/ WORKSHOP/TRAINING (continued)

(Left Side of Conference Approval Form)

SIGNATURES:

Proper signatures are required for processing. Signatures must include attendee and his/her immediate supervisor. Please be advised that additional approval signatures from District Office personnel may be necessary to attend the event. This will add additional time to processing your request.

AIR FARE:



Travel arrangements need to be made as soon as possible. Book your flight and print a confirmation form showing itinerary and costs. Attach the confirmation to your expense claim.

HOTEL:



When reserving a room, be prepared with the dates you wish to travel and have a credit card ready to guarantee the room. **The credit card will not be billed; it only holds/guarantees the room when arrangements are made at least 4 weeks in advance.** Give a copy of your hotel confirmation to your site secretary/office manager who will create a requisition for your stay.

***Prudent judgment is expected regarding lodging/hotel accommodations in highly expensive cities when appropriate alternatives are available. Accommodations at conference headquarter hotels are considered to be reasonable expenses.**

AFTER THE CONFERENCE/ WORKSHOP/ TRAINING

(Right Side of Conference Approval Form)

HOTEL:

Original **HOTEL RECEIPTS** for lodging paid by RUSD **must** be submitted to Purchasing within 48 hours of returning from the event.

CONFERENCE EXPENSE CLAIM:

Each attendee will complete their Reimbursement Request (**RIGHT SIDE**) of their Board Approved- ORIGINAL- RUSD Conference Approval & Reimbursement form. Completed forms must have the *original signature* from the Attendee and his/her Immediate Supervisor. Completed forms are then sent to TONI REFFNER in Accounting at the District Office. This must be done within **7 days** after returning from the event.

ITEMIZED RECEIPTS:

Include **original, itemized receipts** (each item and price) for all meals, parking, etc. for which you are requesting reimbursement. *Only items that have been pre-approved by the District on your original Conference Approval & Reimbursement form are reimbursable.* **If workshop registration fees include meal(s), the attendee will not be reimbursed for meals outside of the conference itself.**

After the conference (continued)...

(Right Side of Conference Approval Form)

DAILY MEAL ALLOWANCE:

Meals will be reimbursed at the GSA (U.S. General Services Administration) approved rate for the city/county the event is being held in.

**Meals will only be reimbursed for overnight conferences/workshops.*

PERSONAL ITEMS:

Personal items, personal phone calls, additional snacks, movies, and alcoholic beverages are **NOT** approved expenditures. Tips for maid service and bellmen are **NOT** reimbursed. Meal gratuity is reimbursed at **15% PRE-TAX meal cost** where applicable.

MILEAGE:

The current IRS approved mileage reimbursement rate is used to calculate round trip from the work site to the destination as the actual mileage (your home, if shorter). However, the District encourages carpooling when more than one individual is attending the same conference from the same site.

AUTHORIZATION:

Expense reimbursement claims **will NOT** be honored for trips made without prior authorization on the **RUSD CONFERENCE APPROVAL & REIMBURSEMENT form**.

PROCESSING TIME:

Please allow at least **30 days** to process a payment. **Follow listed procedures to reduce unnecessary delays!**

After the conference (continued)...

(Right Side of Conference Approval Form)

TIPS TO EXPEDITE REIMBURSEMENT:

1. Tape each receipt to a sheet of paper, one receipt on a page; sign each receipt. **COPIES of RECEIPTS WILL NOT BE ACCEPTED.** All receipts **must be itemized** and include name of the person requesting the reimbursement. Please do not use a highlighter as it erases ink over time.
2. Review the **LEFT** side of your approved **RUSD CONFERENCE APPROVAL & REIMBURSEMENT form** to confirm the amount you were pre-approved.
3. Check your math.
4. Sign the **RIGHT** side of your **RUSD CONFERENCE APPROVAL & REIMBURSEMENT form**.
5. Get your supervisor's signature on the **RIGHT** side of your **RUSD CONFERENCE APPROVAL & REIMBURSEMENT form**.
6. Make and keep a copy of **ALL** the information you are sending to the District Office including to whom you addressed the envelope.
7. Submit **ORIGINAL RUSD CONFERENCE APPROVAL & REIMBURSEMENT form** to **TONI REFFNER-ACCOUNTING** within **7 days** of returning from event.



Conference & Workshop Attendance and Reimbursement Procedure

