

CONFERENCE REQUEST PROCESS

HUNTINGTON BEACH ADULT SCHOOL

October 24, 2013



HOW TO ATTEND A CONFERENCE

FOUR EASY STEPS TO PROCESS A CONFERENCE REQUEST

- i** The following will provide detailed instructions on how to go through the process of attending a conference with these 4 easy steps:
1. How to Complete the Request Form
 2. How To Begin The Approval Process
 3. How to Process Prepayment
 4. How to Request Reimbursement

Where to Begin

- i** In order to attend an off-site work-related event, paperwork is required for school board approval. There are two forms that are required to be completed and submitted - **Authorization Request for Professional Business Attendance (otherwise known as: POB)** and **Request for Payment/Reimbursement of Professional Business Expense** forms. These forms pertain to the following off-campus events:
- Conferences
 - Seminars
 - Workshops
 - Meetings
 - Activities
- Note: Field trips require a different form.

Policy and Deadlines

- i** If attendance at a conference, seminar, workshop, outside meeting or activity requires that you be away from your assignment without reporting to work or involves financial reimbursement, staff members must submit completed conference request forms (See Appendices 1a and 1b). The forms shown as Appendices 1a and 1b must be submitted to the school business assistant's office at least one month prior to the conference.

Conference requests must be approved by the Board of Trustees at the District Board Meeting prior to attendance. The Board of Trustees only meet once a month. See Appendix B for dates.

STEP 1 - How to Complete the Request Form

i The fillable pdf POB form can be obtained from your department secretary or download [here](#).

ON THE LEFT SIDE OF THE FORM (Budget Information)

- Superintendent/Assistant Superintendent Approval ONLY: Check this box if your total amount is \$500 or less. If this is the case, this form will not need Board approval and will be filed in the office of the Assistant Superintendent of Educational Services.
- Title: Check appropriate box PLUS type in the official name of the conference. (Please type out abbreviations. i.e. ESL = English as a Second Language)
- Purpose: Type one or two sentences describing the reason why you wish to attend. (i.e. "To obtain updated information regarding the GED (General Educational Development) test...")
- Location: City and State
- Dates: Date(s) of event
- Attendance as: Leave blank
- Requestee(s): Attending staff member's name
- Refreshments Payee(s): Leave blank. This is only if our school is hosting and reimbursement for the staff member purchasing refreshments prior to the meeting.
- BUDGET INFORMATION: Always check the second row box "Special Programs" and type in after (specify) your department/program that this will be charged to.
- Account No.: Leave blank. This will be filled out by your department secretary or the school business assistant.
- Date Submitted: Leave blank. School business assistant to fill this out.
- Date Board Approved: Leave blank.

RIGHT SIDE OF THE FORM (Budget Information – Continued)

- Authorization Request No.: Department secretary to fill out.
- Meeting/Activity Refreshment: Leave blank
- SUBSTITUTES –
 - o No. of Subs: Type in the number one if you require a sub during this time, if applicable.
 - o For No. of Days: Total of days you will require a sub.
 - o Cost per Day: Leave blank. School business assistant to fill out.
 - o Total Cost: Leave blank. School business assistant to fill out.
 - o Program: Type in your department.
 - o Account No.: School business assistant to fill out.
- TRANSPORTATION – Check the appropriate box. Program and Account No. – Leave blank.
- EXPENSE ESTIMATES – Always fill out the Column B) Special Program.
 - o Registration: Type in the cost of the event/registration.
 - o Lodging: Type in the TOTAL cost of the hotel expenses (*x days of stay, including tax and fees*). Add \$50.00 for cushion.
 - o Transportation: Type in the TOTAL cost of all transportation expenses (*x days of use*). This includes airfare, mileage if using a private vehicle (*round trip*), parking fee (*x days of stay*), taxi or shuttle costs.
 - o Meals: Type in the TOTAL cost of all meals. Maximum per day is \$37.00.
 - o Other Expenses: Leave blank. Very rarely filled out.
 - o Total: The total will automatically calculate.
- Substitutes: Leave blank.
- GRAND TOTAL: Grand total will automatically calculate.
- APPROVALS - Department secretary to obtain appropriate signatures.

STEP 2 - How To Begin The Approval Process

- i** Print out a hard copy and turn it in along with all your back up documents to support this request to your department secretary for approvals/signatures. Back up documents include: Completed registration form, an agenda, airfare information, and hotel information. All documents will need to be turned in prior to the school business assistant's deadline (See board meeting timeline chart which includes the dates items are due to the school business assistant and the dates items are due to the district office and the board meeting dates). Again, all board items need to be processed at least one month prior to the actual board meeting. Your conference request will not be submitted unless the timelines are met.

STEP 3 – How to Process Prepayment

i Many times, conferences require prepayment. In order to receive prepayment from the district, a **Request for Payment/Reimbursement of Professional Business Expense** form must be filled out. The fillable PDF form can be obtained from your department secretary or download [here](#).

The fillable PDF form can be obtained from your department secretary.

- Authorization Request #: Department secretary to fill out. It should be the same number that was applied for the Authorization Request for Professional Business Attendance form.
- Name: Attending staff member's name
- Address: Home address
- City: City of residence
- State: California
- Zip Code: Home zip code
- Account Code: Leave blank. School business assistant or department secretary to fill out.
- Conference/Workshop OR Meeting/Activity: Please check one of the two boxes.
- Title of: Type in the official name of the conference. It should be exact title from the Authorization Request for Professional Business Attendance form.
- Location: City and State of the conference
- Dates of Attendance: Date(s) of event
- Board/Asst. Supt. Approval Date: Leave blank.
- Amount Approved: Type in the grand total amount shown on the authorization request form.
- I. ADVANCE/PAYMENT REQUEST –
- Check the “Registration Fee” box.
- Check Payable To: Type in the name of what the registration requires. It is not necessarily the name of the host company.
- NOTE: There are two options for the delivery of the check. Either the district can mail it for you or you can type a note in this section stating “send check to the name of the person who prefers to mail the check themselves”. This can be your name or the name of your department secretary.
- Date Needed: Date of when the check needs to be either delivered (by the district) OR the date of when it needs to be delivered to the staff member who prefers to mail the check.
- Check #: Leave blank. For district use only.
- IA: Total registration amount
- Jump down to ... (Sections B and C are for rare situations)
- Requestee Signature and Date: Attending staff member's signature and current date.
- School Business Assistant Signature and Date: Must be signed and dated by SBA.
- Authorized Business Signature and Date: Leave blank. For district use only.

This form will need to be attached to the Authorization Request for Professional Business Attendance form and given to the school business assistant (refer to monthly deadlines). The SBA will then submit this for board approval. Be sure to keep a copy or save this document. One will need to fill out the rest of the reimbursement form after attending the conference for reimbursement.

STEP 4 – How to Request Reimbursement

- i** After attending the conference, please turn in the following items for reimbursement: original parking receipt(s), proof of attendance such as name badge or agenda, original itemized hotel bill, and/or original airfare ticket/receipt. Meal receipts are not required. On your copy of your reimbursement (OR retrieve this form in your computer so you can use the automated fillable PDF format), the following sections will need to be filled out.
- II. EXPENSE REPORT –
 - A. Registration Fee: This amount is to be filled out ONLY if prepayment was not processed. If so, please attach the original receipt for this registration. Type or write in the fee amount in IIA.
 - B. Hotel/Lodging: Type or write in the total hotel fee in IIB. Attach original itemized hotel bill.
 - C. Transportation Total: Fill in IIC unless you are using the fillable PDF format which it will then automatically display the total.
 - Dates of Expense: Place a date in each individual column.
 - Meals: Place the amount in each of the meals for each day. (breakfast, lunch and/or dinner)
 - D. Meals Total: Fill in the total in each column unless you are using the automated PDF format.
 - E. Refreshments and F. Miscellaneous Total are rarely used. Fill in totals if applicable.
 - Sections 1-4 (Total Expenses through Total Amount Due Claimant) are to be filled out accordingly.
 - CERTIFICATION – Signatures below are to be obtained by the department secretary.
 - Claimant Signature: Attending staff member's signature.
 - Department Coordinator Signature: Assistant Principal's signature.
 - Site Administrator Signature: Principal's signature.
 - School Business Assistant Signature: Turn in this original form (plus all original receipts and a copy of the Authorization Request for Professional Business Attendance form) to the SBA for signature. SBA will then submit this to the district office. Be sure to keep a copy for your records. A reimbursement check will be distributed 2-4 weeks after requesting submission.