



CHECKLIST FOR REQUESTING WORKSHOP / CONFERENCE FUNDS

BEFORE THE CONFERENCE

- Visit the LOHS Staff Development website and review the guidelines for requesting workshop/conference funds.
- Complete a "Workshop/Conference Funding Application" via the online or printable form available on the LOHS Staff Development website. If using a paper form, obtain the appropriate supervisor signature.
- Attach conference information to the application (title page of conference brochure, registration and payment information, and completed registration forms). Note that digital versions are required for online applications.
- Submit the completed funding application and attachments online or forward to Alicia Becker (LOHS Library) or your department's SSDC Representative at least one-month prior to the conference registration deadline.
- Wait for notification of approval/denial from Site Staff Development Committee.
- Registration.** Upon receiving notification of approval, follow through with self-registration for the conference or verify district registration. If the district is paying for your registration, you will receive a Purchase Order (PO) as proof of payment.
- Substitute.** If necessary and approved, obtain and complete the "Request to Attend Conference/Workshop/Meeting and Substitute Request" form (PERS 127). You may obtain this form from Lynne Ciotti (Principal's Secretary).
 - Complete the top portion of the form and obtain the signature of your immediate supervisor.
 - Request a substitute on AESOP, and record the substitute job number on the PERS 127 form.
 - Do not write anything in Section 3 of the form.
- Airfare.** If necessary and approved, you will receive a requisition number from the district. Then call Bradford House at (909) 986-4176, and make your travel arrangements with your requisition number.
- Hotel.** If necessary, and approved, make your hotel arrangements using your personal credit card. Be sure to use the single room rate or double occupancy rate only.

DURING THE CONFERENCE

- Hotel check-in.** Provide the hotel check-in clerk with a copy of the "Transient Occupancy Tax Exemption" (Fiscal Services 002 Form) form found at SharePoint / Purchasing / Shared Documents.
- Registration.** Take a copy of your registration or Purchase Order as evidence of payment for the conference.
- Receipts.** Save all your receipts. *Make sure all your receipts are itemized.*
 - Individual meal receipts. The meal allowance is \$60/day. Be sure meal expenses do not exceed this. Alcohol is not reimbursable. Tips will be reimbursed up to 15% only if **printed** on the receipt. Meal receipts must be itemized.
 - Group meal receipts. The cost of a group meal will be evenly divided by the number of group members. Payment for the group meal will be the first deduction from each person's daily meal allowance. Automatically charged gratuities for a large group (above 15%) will be reimbursed.
 - Cab receipts. Cab fees will be reimbursed if pre-approved. You must have an original receipt.
- Hotel check-out.** Get an original, itemized hotel bill. Only single room rate or double occupancy rate will be reimbursed. Movies, service tips, internet access fees, and personal phone calls WILL NOT be reimbursed. Self-parking WILL be reimbursed, but valet parking WILL NOT be reimbursed.
 - If sharing a room, ask the hotel to "split the bill" and give you and your roommate a copy each. If they will not split the bill, write the name of the staff member who shared the room with you on the top of the receipt.
 - For single room rates that are not identified as such on the itemized hotel bill, ask the hotel clerk to complete a "Certification of Single Room Rate" form (Bus. Of. 49) found at SharePoint / Purchasing / Shared Documents).

AFTER THE CONFERENCE

- Complete the "CJUHSO Conference and Convention Reimbursement Form" (Bus. Of. 15) found at SharePoint / Purchasing / Shared Documents.
- Include a copy of the conference registration and an original conference brochure.
- Include original, itemized receipts for approved registration (if self-paid), hotel, airfare, cabfare, and meals (\$60/day max).
- Include "Certification of Single Room Rate" form, if necessary.
- Include MapQuest or Google Maps printout(s) if requesting mileage reimbursement.
- Obtain your supervisor's signature.
- Make copies of all forms and receipts for your records.
- Submit all original documents to Alicia Becker (Librarian) or your department's SSDC representative within 30 days of the conference.