Online Conferences & Trainings
What you need to know..

Are online conferences, trainings and professional development permissible?
At this time, there is a districtwide effort to control expenditures. Online conferences or trainings that would incur costs in any Unrestricted and or Restricted Fund (including Funds 11, 12, 13, or 33) should only be requested if necessary to support student services and programs, or essential operations or necessary to maintain certification required by position. Please note that grant funds are not exempt.

Online conferences or trainings will require approval from your immediate supervisor as well as Chancellor's Cabinet member (Chancellor, Vice Chancellor or President) review and approval.

Is there a cap on the number of employees who can attend an online conference or training?
While there is no cap, the number of employees who attend any given conference or training should be limited to those employees required to attend. In most cases, this would be employees who based on their role at the College or District, have a direct responsibility for the information that will be shared at the conference or training.

Which object code do I use?
Object code 5215 should be used for online conference and online training courses.

Which form do I use?
The Conference Request Claim Form should be used for online conferences or training courses. Online conferences or trainings must be pre-approved by your direct supervisor and by Chancellor's Cabinet member prior to registering.

The Conference Request Claim Form is available on the Fiscal Services webpage.

IMPORTANT: Please note that the business reason noted on the Conference Request Claim Form must explain why attending the conference or training is necessary, otherwise the request may be denied.

Is pre-approval required?
Yes. Online conferences and trainings must be pre-approved prior to attending. Approval by your direct supervisor and by Chancellor's Cabinet member must be documented on the Conference Request Claim Form.

Do I need to submit a Purchase Requisition?
No. Do not submit a purchase requisition for online conferences and trainings.

How do I request reimbursement?
Submit the following documents to Accounts Payable:
- The Conference Request Claim Form (Part I & III completed).
- Conference or training literature, including registration fees.
- Proof of payment (e.g. email confirmation showing registration fees were paid).
- Please note the mailing address where to send the check. If a mailing address is not noted, Accounts Payable will use the employee's mailing address in Colleague.

Email these documents as one PDF to Accounts Payable. Debbie Perales (Perales_Debbie@rsccd.edu) processes requests from employees with last names starting with A-S. Dana Ericson (Ericson_Dana@rsccd.edu) processes requests from employees with last names starting with T-Z.

How do I request the vendor to be paid directly?
Requests for advances **must** be submitted at least 15 business days before the check is required. Late requests may not be processed by the required deadline.

Submit the following documents to Accounts Payable:
- The Conference Request Claim Form (Part I & II completed).
- Conference or training literature, including registration fees.
- Vendor invoice
- If the sponsoring organization is a new vendor in Colleague, please include the organization's W9 form.

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After attending the online conference or training, please submit the Conference Request Claim form (Part III completed) to Accounts Payable in order to reconcile your advance.

Can I request a cash advance for online conferences and trainings?
No. Registration fees for online conferences and trainings can be either reimbursed or the vendor can be paid directly.

If an online conference or training is <u>free of charge</u>, do I need to obtain pre-approval on a Conference Request Claim Form?
No, however, you will need to request pre-approval from your direct supervisor.

If I have additional questions, who should I contact?
Please contact Debbie Perales (A-S) (Perales_Debbie@rsccd.edu) or Dana Ericson (T-Z) (Ericson_Dana@rsccd.edu) in Accounts Payable, or Erika Almaraz (Almaraz_erika@rsccd.edu).

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