



Genesee Education Consultant Services

G-6235 Corunna Rd., Suite C, Flint, Michigan 48532
(810) 396-1100 Fax (810) 720-4341
www.gecs-inc.org

Conference Process

- 1) Conference attendee completes Conference/Staff Development/Meeting Request Form located at <https://www.gecs-inc.org/forms-conferencereimbursement-forms.html>
 - a) If the conference has multiple dates that are in 2 different fiscal years, fill out 2 different conference requests for the dates in the specific years.
 - b) Provide estimated expenses for all conference related expenses
 - c) Follow Meal Allowances based off rates from the U.S. General Services Administration website: <https://www.gsa.gov/travel/plan-book/per-diem-rates> (only applies to overnight conferences). Include supporting documentation showing the Meal Allowance Rate
 - d) Expenses for hotel rooms shared by more than one person are split evenly and recorded on each person's Conference/Staff Development/Meeting Expense Reimbursement Request (Please indicate if sharing and other person's name)
 - e) If the conference requires multiple hotel bookings then each booking must have its own Conference Travel Accommodation Request Form and include proper backup documentation
 - f) Include a copy of the program announcement for the activity; it should include pricing for registration and lodging information (if offered)
 - g) If an account was created for registration include the login information
 - h) Include the filled-out copy of the Employee Conference Request Check List
 - i) Expenses that are not pre-approved on this form will not be eligible for reimbursement
- 2) Staff Member submits completed Conference/Staff Development/Meeting Request Form along with the Employee Conference Request Check List to supervisor or equivalent approver
- 3) Once all of the proper approvals and signatures have been gathered the secretary will forward the approved and completed Conference/Staff Development/Meeting Request Form along with the Secretary Conference Check List to GECS Accounts Payable at ap@GECS-inc.org
- 4) If the request is **NOT** approved, the form is sent back to the program or department with a note indicating why the conference was not approved.

- 5) If the request has been approved, GECS assigns a unique tracking number to the conference request form and enters the relevant information in the GECS Conference Log. Refer to this tracking number on all related conference paperwork.
- 6) GECS will send an email to the department contact giving them the assigned conference tracking number.
- 7) Upon receipt of approval for the conference from GECS, purchases orders can be created for registrations, lodging, air fare, etc. The assigned tracking number should be included in the body of all Purchase Orders related to the conference. Your PO should have each item listed on a separate line (i.e., flight, hotel, registration) for the staff member/conference attendee's conference.
- 8) Once GECS receives the Purchase Order all arrangements will be made and confirmations will be sent to the department contact.
- 9) Staff Member/Conference Attendee completes Report of Absence (ROA) Form and submits it to department Supervisor/Secretary/Director/Asst. Superintendent/ Superintendent for approval.
- 10) Department Supervisor/Secretary/Director/Asst. Superintendent/Superintendent submits the ROA form to the GECS Payroll; payroll@GECS-inc.org

AFTER EMPLOYEE ATTENDS A CONFERENCE

- 11) Attending Staff Member completes Conference/Staff Development/Meeting Expense Reimbursement Form as well as the GECS Employee Conference Reimbursement Check List ***within 14 business days after the conference***. Use current updated form located at ***<https://www.gecs-inc.org/forms-conferencereimbursement-forms.html>***
- 12) Record assigned Tracking Number
- 13) Lodging expenses are recorded per day
- 14) Expenses for rooms shared by more than one person are split evenly and recorded on each Staff Member's Conference/Staff Development/Meeting Expense Reimbursement Form.
- 15) Attach a copy of hotel folio with breakdown of room charges, taxes and fees that you received after check out.
- 16) Registration fee is recorded on first day of conference
- 17) Air Fare is recorded on day of departure

- 18) Detailed **itemized** receipts must be provided for all meals (state sales tax is not exempt for prepared restaurant food and can be reimbursed)
- 19) Mileage will be reimbursed up to the number of miles pre-approved on the Conference/Staff Development/Meeting Request Form (Mileage that is associated with this conference should be entered on this conference reimbursement form and not on your travel form.) If carpooling, the person who drove will be reimbursed for the mileage; please include:
 - a) Driver Name
 - b) Passenger (Staff Member) who rode in the car with the driver.
- 20) Include copies of detailed receipts for all additional expenses (i.e., parking, car rental, baggage, bus fare, Uber or Lyft) on this reimbursement.
- 21) Prepaid Expense Information – Include vendor name, PO#, and amount of expense that was prepaid.
- 22) Secretary/Project Specialist/Project Coordinator verifies:
 - a) Expenditures are correct and allowable
 - b) Mileage is appropriate
 - c) Conference dates on requisition/brochure match dates on Conference/Staff Development/Meeting Expense Reimbursement Form
 - d) Meal allowance was followed in accordance to the rates provided by GSA
 - e) Totals are calculated correctly (including Prepaid amounts)
 - f) ROA has been completed
 - g) GECS Employee Conference Request Checklist is completed
- 23) Confirm and verify that the account # allocations (located on the bottom left of the Conference/Staff Development/Meeting Expense Reimbursement form) equals the amount listed for the “Total Reimbursement Requested”.
- 24) Acquire the following signatures on the Conference Expense Reimbursement Form before forwarding the approved form to GECS:
 - a) Staff Member/Attendee
 - b) Supervisor/Director/Superintendent
- 25) Forward approved and signed Conference/Staff Development/Meeting Expense Reimbursement Form, receipts, and checklists to GECS AP.
- 26) Upon receiving of the Conference/Staff Development/Meeting Expense Reimbursement Form, receipts, and GECS Conference Reimbursement Request Checklists GECS will:
 - a) Attach the Conference/Staff Development/Meeting Request Form and packet to the Conference/Staff Development/Meeting Expense Reimbursement Form along with receipts.
 - b) Confirm whether or not there are any reimbursements associated with the conference.

- c) If there **are reimbursements** associated with the conference, GECS will review for accuracy.
- d) If the documentation is **incomplete**, the Conference/Staff Development/Meeting Expense Reimbursement Form will be returned to the employee and noted in the GECS Conference Log.
- e) If the documentation is **complete**, the Conference/Staff Development/Meeting Expense Reimbursement Form is initialed by GECS, and noted in the GECS Conference Log.
- f) Employee will receive reimbursement on their next paycheck following the GECS payroll schedule.
- g) Any unauthorized charges made on behalf of the employees by the hotels to the GECS credit card will be deducted from the reimbursement. In the event of zero reimbursement employees will be invoiced accordingly.
- h) Expenditures not pre-approved and costs exceeding the approved request may not be reimbursed

27) If Staff Member did **NOT** attend the conference:

- a) Department contact is to notify GECS AP as soon as possible so that any incurred expenses can be refunded
- b) Employee is to fill out the Conference/Staff Development/Meeting Reimbursement form
- c) At top of form, please write “Did Not Attend” (Staff Member chose not to attend or was unable to attend) or
- d) At top of form, please write “Conference Canceled” (Event/Conference canceled their event and it was NOT held).
- e) In either of the above scenarios, the Conference/Staff Development/Meeting Expense Reimbursement form needs to be filled out in order to “close-out” the tracking #.

28) If Staff Member wishes to extend their hotel stay beyond conference dates:

- a) Staff member is responsible for booking their hotel accommodations themselves. Appropriate hotel documentation must be submitted to Department Supervisor for approval; this is done via Conference Travel Accommodation Request Form
- b) To claim reimbursement the staff member must submit the hotel folio (receipt) that includes a detailed breakdown of daily costs with the required Conference/Staff Development/Meeting Expense Reimbursement Request form. Reimbursement for lodging will only be provided for the duration covering the conference dates.
- c) Once the Conference/Staff Development/Meeting Expense Reimbursement Request form has been submitted it will then be reviewed and approved based on adherence to company policy and submission of necessary documentation.