

# Procedures for Professional Activity/Travel Request & Reimbursement

\*Information in blue is only for activity/travel funded by Staff Development

- 1) Identify a conference or other professional activity you would like to attend. Conference announcements are available in the Staff Development Teaching Effectiveness Center, Room 800-LLRC. Some division offices may also post or have information available on conferences specific to their disciplines.
- 2) **Complete the "Professional Activity/Travel Request"** found on the J: drive under Forms and Procedures/Travel Requests and follow the process on the form.
- 3) **Staff Development Approvals:** Staff Development funds require an additional review by a committee or through a division process for the following constituent groups:
  - **Faculty** requests are reviewed through an activity/travel procedure as defined by their division. Contact your division Office Manager or Dean for details.
  - **Classified Staff** requests are reviewed by the Classified Senate Travel Committee. Submit your Travel Request Form to Ericka Adakai.
  - **Manager** requests are reviewed by the Manager's Travel Committee. Submit your Travel Request Form to Nilo Niccolai.

**IMPORTANT:** Constituent representative reviewing the travel request should input maximum dollar amount available for reimbursement and insert their initials as Verified by". Travel Request Form must be sent as an email attachment and not incorporated as part of the email.

- 4) Once activity/travel is approved by the appropriate VP, Wendy Bailey (x25005) will generate the RQ in Banner for activity/travel requests funded by Staff Development. Division staff will generate the RQ in Banner for all other activity/travel requests.
- 5) **Pre-activity/travel payments:** Generally, staff pay registration and related expenses in advance and are reimbursed by the district (see #6 below). However, to find out what the district might be able to pay in advance, contact Wendy Bailey (x.25005) at least five weeks in advance of activity/travel.
- 6) **Upon completion of activity/travel:** Submit a "Travel Expense Report" even when there are no out-of-pocket expenses. The "Travel Expense Report" template can be found on the J: drive under Forms and Procedures/Travel Requests. Employee should submit the travel expense report with other documentation (noted below) to Wendy Bailey (x25005) for activity/travel funded by Staff Development or to their division (department) office staff for all other activity/travel. Reimbursement requests funded by Staff Development must be submitted within 30 days of the completion of travel or by June 10<sup>th</sup>, whichever comes first. For all other activity/travel, employee should check with their division office for reimbursement request deadlines.

**IMPORTANT:** Errors or omissions generally cause delays in getting reimbursed so please refer to the steps below and contact Wendy Bailey at x. 25005 for assistance.

1. Record the itemized expenses on the Travel Expense Report.
2. Include any amount prepaid by the District.
3. The "Total Due Employee" amount should not exceed the maximum amount that was approved for the same activity/travel requested.
4. Attach the conference flyer and original registration receipt indicating that payment has been received.
5. If claiming transportation or lodging, an itemized original receipt indicating that payment has been received must be attached.
6. Note that there are maximum amounts for meals posted on the District's webpage as well as a list of high/low per diem cities:  
<http://www.nocccd.edu/Departments/FandF/Accounting.htm>.

**Condition for SD funding:** Attendee agrees to share information within his/her division/department/program or campus wide by means of a round-table discussion, workshop, or presentation within six months following the funded conference or seminar. Attendee(s) interested in making a presentation through Staff Development must contact the Staff Development Coordinator. Flex Credit is available for making a presentation on campus or district-wide.