Eastern Suffolk BOCES
Educational Services That Transform Lives

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Conference/Meeting Requisition Procedure

Please refer to Regulation 5210R.1 for in-depth instructions regarding employee attendance at conferences, meetings and workshops.

The following procedure is developed to address questions regarding the requisition process for conferences, meetings and workshops.

1. The attendee must complete the Conference/Workshop Attendance Request and Claim Form #5210F.1 and route to all appropriate administrators for approval at least 6 weeks prior to the event. Please note that all forms are to be signed by the Director and associated Cabinet member. Overnight trips of 3 nights or longer, all trips outside of NY or virtual functions of 4 days or longer require the signature of the Chief Operating Officer.

2. Once all signatures have been obtained, requisition(s) for all expenses are to be entered and approved in WinCap and the supporting Conference/Workshop Attendance Request and Claim Form and verification of costs must be attached to the requisition. **Please note that requisitions should not be routed prior to all signatures being obtained.**

3. There may be several requisitions created for one event. (Hotel, Registration, other expenses). If the employee is paying everything directly then there will only be one requisition made out to the employee, please do not create multiple requisitions for expenses paid to the employee. However, if the box to the left of the lodging and/or registration fee is checked, separate requisitions should be created for those vendors.

4. All expenses paid to the employee are to be combined on one line on the requisition, please do not split the costs into multiple lines. The description on the requisition should be entered in the following format:

   Estimated expenses for (employee name) to attend (full name of conference) from (date – date) in (location)

5. Please be sure to attach all necessary backup documentation to the requisition(s) which includes, but is not limited to, flyer or other documentation from event coordinator showing dates and location, Google Maps (or similar) showing mileage less any daily deducts, hotel confirmation showing the dates of stay and rate (if applicable), registration (if applicable), airfare/rental car/train fares, and any other quantifiable expenses.

6. Meal expenses should be estimated in accordance with Regulation 5210R.1.

7. Hotel rates should be indicated without taxes if the hotel is in NY since ESBOCES is tax exempt. Not all hotels accept Purchase Orders so please make sure to verify with the hotel that they accept Purchase Orders prior to creating the requisition if the attendee is planning on having ESBOCES pay the hotel directly.

8. The “Requisitioner” to be entered in WinCap is the person attending the conference. This will ensure proper routing and approvals of all requisitions.

9. All requisitions must be complete and approved by Purchasing prior to travel. Any requisitions done after travel commences will be confirming and a memo will be sent to the department.

10. If an advance payment is requested on the Conference/Workshop Attendance Request and Claim Form, this must be submitted to Purchasing at least 3 weeks prior to the event in order for the PO to be issued and the check to be cut by Accounts Payable prior to travel.

11. If travel is unforeseen and the requisition is created a few days prior to the event, please indicate the requisition is a RUSH in the notes section. If a requisitioner fails to mark a conference as a RUSH and adequate time is not available for Purchasing to approve, the requisition will be considered confirming if approved after travel commences.

12. Requisition(s) for travel should be received in Purchasing within <u>at least</u> one week prior to travel commencing.