

EDUCATION FOR EMPLOYMENT EXPENSE FORM APPROVAL & REIMBURSEMENT DIRECTIONS

To be used when requesting funding or reimbursement for a conference, professional development, field trip, or student organization (CTSO) event.

IMPORTANT: Requests need to be submitted, minimally 30 days, prior to an event when asking Kalamazoo RESA/EFE to assist with conference pre-registration and/or hotel accommodations; otherwise the instructor will be responsible for making arrangements and being reimbursed.

Pre-Approval EFE Expense Form

Be sure requests are clear, otherwise processing will be delayed.

Section #1: Instructor/Program Information

- Fill out all areas entirely. **Information is needed for grant recordkeeping.**

Section #2: Estimated Expenses

- Fill in relevant sections under *Estimated Expenses* (the box on left) using dollar amounts.
 - ✓ Registration Fee: list registration expense associated with event.
 - ✓ Lodging: list anticipated hotel expense calculated using the number of nights needed.
 - ✓ Travel by Car - Miles: document your mileage calculation beginning/ending from work or home, whichever is less miles.
 - ✓ Travel – Alternative: attach a copy of travel estimate obtained from transportation or other entity.
 - ✓ Meals: anticipate out of pocket meal expense (s) not included under event’s registration. EFE suggests using the MAXIMUM meal coverage listed on form as the estimate.
 - ✓ Other (Specify): E.g. parking fees, tips, tolls, etc. (Receipts will be required for reimbursement.)
- Total Expense Estimate: provide total amount of the estimated request.

Registration & Lodging Process

- Check area(s) that apply on right side of the expense box. NOTE: if nothing is marked, no action will be taken by EFE staff.
 - ✓ If asking EFE to assist with registration/lodging, attach documentation that fully explains event registration particulars, hotel contact information, and exact check-in/check-out dates.
- Conference Expense forms DO NOT need to reflect the cost of a substitute. (All Instructor substitute expenses are figured within the EFE budget.) If a substitute is required, the instructor should follow his/her home district’s substitute request process. Non-school district employees are to follow the protocol listed within their contract.

Section #3: Instructor Signature

- Sign and date form
- Submit form via email, fax 250-9301, or REMC to your Program Administrator. Expense requests need to be approved, and on file, before any assistance or reimbursement can take place.
 - ✓ The instructor will receive an email indicating whether or not the expense request was approved.

Additional Information:

- It is very important that EFE understands your request. Attach documentation that explains who to contact, where to send check, and/or detailed receipts.
- If an instructor is being reimbursed, make sure you have a W-9 on file. (W-9's expire every three years. A copy of a new form can be found on the EFE web page.)

EFE Expense Form- Reimbursement

Keep the following points in mind when seeking reimbursement.

- ❖ Requests need to be easily understood, or processing will be delayed.
- ❖ Reimbursement requests are to be submitted within 30 days following the event.
- ❖ Kalamazoo RESA/EFE will not reimburse for expenses that exceed the estimated totals.
- ❖ Detailed receipts are essential for all reimbursements, except for mileage.
 - Original receipts are required and should be stapled to the reimbursement request.
 - Credit card statements are not acceptable.
- ❖ Particulars outlining instructor reimbursement requests should be submitted on the **EFE Teacher Reimbursement Form** using subsequent instructions.

Section #1 Check Request

- Clarify how reimbursement is to take place.
 - ✓ A current W-9 **MUST** be on file in order to receive reimbursement.
 - If you have a W-9 on file with Kalamazoo RESA within the last 3 years, you are not required to submit a new form, unless you have moved.
 - ✓ Invoices submitted must be made out to KRESA/Education for Employment. If made out otherwise, a new invoice will need to be generated.

Section #2: Actual Expenses

- Fill in relevant sections under *Actual Expenses* (the box on the left) using dollar amounts.
 - ✓ Registration fee: list registration fee that was paid along with receipt showing payment.
 - ✓ Lodging: list actual hotel expenses along with hotel receipt showing paid in full.
 - ✓ Travel by Car - Miles: roundtrip number of miles entered to left of @ sign, amount per mile to the right of the @ sign; total after the \$ sign. Mileage calculation is to begin from work or home, whichever is less miles.
 - ✓ Travel – Alternative: list actual expenses along with a copy of bill or receipt showing paid in full.
 - ✓ Meals: Under each day of activity, enter the amount of reimbursement by meal. Reimbursement will be limited to maximum listed on form.
 - Credit card summary receipts are NOT accepted; DETAILED receipts are required.
- Other (Specify): Brief description of item to left of \$ sign. Cost of any other items such as parking fees, tolls, etc. and cash amount to right of \$ Sign.
- Total Expenses: Provide a total reimbursable amount. (Itemized receipts need to be attached for each area, except for mileage, when requesting reimbursement.)

Section #3 Instructor Signature

- Sign and date the form
- Reimbursement requests should be sent to Carol Geving at Kalamazoo RESA Education for Employment.
- Kalamazoo RESA cuts checks every two weeks, consequently depending upon when the request was submitted, reimbursement could take longer.
 - ✓ Reimbursement will be sent to the instructor's home address based on information found on the W-9 on file.