

## CONFERENCE AND TRAINING (C/T) REQUESTS

### General guidelines:

- All C/T must be relevant to staff's current position at the ADRC, and be approved prior to attending.
- ADRC Staff will generally be limited to one hotel-stay conference a year. Hotel stays will only be approved for C/T that are two or more consecutive days in duration and the location is over a one hour drive from the ADRC.

ADRC staff are responsible for following this process when requesting to attend a C/T that has a cost associated for which the employee will be requesting reimbursement.

Complete the County of Dane Conference/Training & Education and Outreach Request form:

<https://dcinet.connect2dane.com/resources/kxw3.CONFERENCE-TRAINING-EDUCATION-AND-OUTREACH-FORM-FILLABLE.pdf>

- You will not be able to receive reimbursement for more than what is listed on the request – Your reimbursement may be for less, if actual costs incurred end up being less than estimated.
  - TRAVEL: If claiming mileage, put an x on the line next to "TRAVEL". On the line next to "Other" write in the number of miles round trip. Dane County requires that workers ride together and take the most direct, shortest route. We recommend you figure the estimated cost using Google Maps and a regular mileage form, and consider passengers (5 cents per mile per person), to estimate this cost. If you leave from home, you will be reimbursed for the mileage from either your home to the conference, or from the ADRC to the conference, whichever is less. You will not be reimbursed for picking up co-workers outside of this direct route. You may consider using a county car or van pool for out of county conferences. You can call or email Kris Meyer (608) 266-9040 [meyer.kristi@countyofdane.com](mailto:meyer.kristi@countyofdane.com) to reserve one.
  - LODGING: If others are going, we encourage sharing rooms to keep costs down. Lodging costs can not include taxes. Be sure to bring tax exempt form to training with you for hotel payment if needed (see page 3 of this process). Be sure to get a receipt printed from the hotel that shows payment and verification of "accommodation" so there is clarity that you paid the hotel for the room, not food, entertainment etc. Only original receipts will be accepted. If there is a limited number of rooms available, you may want to make a room reservation before you receive a signed approval, as long as you can cancel the room without penalty.
  - MEALS: Follow county reimbursement, effective September 1<sup>st</sup>, 2019, on meal reimbursement rates (Max: breakfast - \$8, lunch - \$10, dinner -\$20). Gratuity for meals is included in the per meal reimbursement rates. If there is no overnight hotel stay then the meals are taxable and will be reimbursed through payroll.
  - REGISTRATION FEE: List fee here. If there is a portion of the fee is just for CEU's earned, you will need to subtract that amount from the registration fee. It is county practice to not pay fees specifically for CEU certs. After you receive your signed approval, you need to register for the training/conference and make payment yourself.
- Print the completed request form, sign as "ATTENDANT" and submit the form to immediate supervisor. Supervisor/Manager will forward the requests for "DEPARTMENT HEAD'S SIGNATURE" after consideration is made to budget, staff coverage, and the topics relation to work.
- When the request form is signed by the Department Head (Shawn Tessmann) and returned to you, put it in a safe place. You will need the original signed form to claim reimbursement for the expenses you incur.
- When form is returned to you signed by Shawn, register/pay for the conference and reserve the hotel if you have not done so already.

**After attending the conference:**

Follow the guidelines in the Administrative Practices Manual – Employee Expense Reimbursement and Food Purchases <https://admin.countyofdane.com/documents/emprel/pdf/apm/ic-meal-mileage-01.pdf>

Complete the Employee Reimbursement form: <http://dcinet/resources/kxw3.EMPLOYEE-REIMBURSEMENT-FORM-FILLABLE-PDF.pdf>

- Department is 6042.
- Date: Start date of Conference or Training, or date the cost on that line occurred.
- Destination of trip: list start and end full addresses. Can write ADRC if started and/or ended here, but conf/training location should be complete. Use only one line per day.
- Purpose of trip: (“Conference” or “Training”)
- Time you left for Conference/Training and time that you returned
- Miles traveled to/from Conference/Training (separate lines for different days)
- Meals: Enter costs incurred and refer to Administrative Practices Manual, link above. Reimbursement requests should match/not exceed what was entered on the C/T Training request.
- OTHER EXPENSES: **You must submit an original receipt of payment with your reimbursement request.**
  - Lodging: The total amount of the room. You cannot claim sales tax. The receipt should show that the payment was for **“accommodations”**. If you have stayed multiple days, each day must be listed separately and align with the date on the far left. Again, this should match/not exceed what was entered on the C/T Training request.
  - Registration Fees: The amount you paid for registration.
  - Parking: the amount you paid for parking.
- Print, sign and date form.

\*If you did not have an overnight hotel stay, then meals are taxable, you will need complete the taxable form

\***If you had a passenger**, mileage reimbursement is taxable, you will need to complete the taxable form for the ADDITIONAL five cents per mile (per passenger) reimbursement. List each passenger, per day on separate lines. <http://dcinet/resources/kxw3.EMPLOYEE-TAXABLE-REIMBURSEMENT-FORM-FILLABLE-PDF.pdf>

\*If you are attending a C/T day that is being held within Dane County, you are not able to claim any meals.

\*If you are going to a C/T where you need to pay road tolls, you will need to provide the receipt for the tolls and write that amount in the “Other expenses” column.

After completing the reimbursement form, submit the following to your supervisor:

- ✓ Signed C/T request form previously signed by Shawn Tessmann
- ✓ Employee Reimbursement Form
- ✓ Employee Taxable Reimbursement Form as applicable
- ✓ All receipts stated as needed above (reg and hotel)
- ✓ C/T agenda and/or certificate of attendance

If you have incurred unexpected expenses that were not on the original request form, please see your supervisor.

**Wisconsin Sales & Use Tax Exemption Certificate**

**Tax Exempt Entity: COUNTY OF DANE**

City-County Building 53709-0001

This is to confirm that the holder of this certificate will be traveling and conducting business on behalf of the County of Dane. He/She is exempt from payment of Wisconsin sales and use tax for meals and lodging under s. 77.54(9a) Wisconsin Statutes. The name of the County of Dane must be included on all receipts along with the name of the employee. The employee is responsible for paying the bill and can then submit an Expense Report for reimbursement from the County of Dane.

Authorized by

*Eugene G. Nelson*

Dane County Controller

NO EXPIRATION DATE

ES41279