

Conference Attendance & MyLearningPlan

Submit early, early, early!

Conference requests must be submitted at least 14 days' in advance. This is the absolute minimum amount of time central administration can allow. Always submit as early as you can. This minimum 14 days notice is necessary so the District's Purchasing Department can prepare the mandatory purchase order before you attend the conference. The purchase order is payable to you and permits the district to reimburse. If the purchase order is not done in advance, you cannot be reimbursed.

This is not only an accepted accounting practice to have a purchase order prepared before an expense is incurred; it is Board of Education policy. When this policy is not followed, it is referred to as a confirmation purchase order.

Regardless of whether you think you can make the conference or not, ALWAYS submit the request 14 or greater days in advance. It can always be dropped but at least there will be a purchase order in place. Additionally, should someone be a last minute replacement, that mandatory purchase order can simply be transferred to your replacement and the District remains compliant.

Approvals

There are two levels of approval -- building level and central administration. Both are required before you can consider yourself approved. A key reason for central administration approval is to get the required purchase order issued before you attend. ***It is your responsibility to ensure you have all approvals before attending a conference.***

All employees must pay registration & other expenses up front.

"The District will pay for it" can be misleading. It does not mean the District will pay on your behalf. It means the District will reimburse you.

Know who is reimbursing your expenses!

You cannot correctly select the Payment/Funding Option unless you know who is reimbursing your expenses. The Payment/Funding selection is key in determining the routing of your request. The wrong selection, the wrong routing. In general:

BCG funded will most always be the choice of teachers.

District Funded is almost exclusively used by central administration; however, there can be occasion when central administration funds will be used to reimburse a non-central administration employee's expenses.

Federal Funded is when grant funds will be used to cover your expenses. This is primarily used by Special Education staff and Teachers' College workshops.

Submit requests whether or not expenses are involved.

The conference request is much more than the vehicle for getting approved for reimbursement of expenses. It tracks professional development, sub requirements, the types of conferences being attended, budget controls, and more.

Whether money is involved or not, requests must be entered into MLP.

Whether money is involved or not, conference reports must be done in MLP. It is the only way for the program to get the status to appear Completed.

[More Information]

This feature is designed for an approver to communicate with the requestor should some clarification be needed. The **More Information** feature only allows you to respond in the Comment Box; you cannot make any changes to the original request.

You can; however, provide the approver with the information requested and ask him/her to edit for you. Otherwise, you will need to "drop" the request and start again.

If you do not respond to [More Information], your request will be stuck in limbo.

To submit a conference request:

1. Select the MyLearningPlan link on the district website's homepage (top right).
2. User ID & Password are the same as your ID/Password for accessing your computer, and other systems assigned to you by the District.
3. Select **Conference Request Form** unless the provider of the conference you plan to go to has their Catalog listed under Catalogs on your homepage (such as Nassau BOCES, Western/Suffolk BOCES, NYSUT, etc.) If there is a catalog, you must enroll via that provider's catalog. Those request forms are entitled BOCES/REGIONAL CONFERENCE REQUEST FORM.

It is easier, quicker, it immediately holds a seat for you and when the district approves you to attend the provider is notified at the same time you are.

4. Only if the conference is not in the provider's catalog, should you use the Conference Request form. Kindly note on your request that the reason you are using the Conference Request form is because the conference was not listed in the Provider's catalog.

Completing the request form:

Conference Details	
This section contains information about the activity	
Name of conference	<input type="text"/>
Description	<input type="text"/>
URL for Description (if none available, see File Attachment section below.)	<input type="text"/>

Name of Conference: Enter the conference title not the organization's name.

Description: Provide some brief details about the conference.

URL: Enter website (preferably a direct link) to the conference information so that:

- Approvers can read more about it, if desired, and
- Administration can quickly locate the supporting documentation required by auditors.

If URL is unavailable: A hard copy of the supporting documentation indicating name, date & cost must be emailed to Kathy Koslow in the Superintendent's office or faxed to 441-4994 or attached as a file to the MLP request.

CONFERENCE PROVIDER	
Provider :	<input type="text" value="Select from dropdown"/>
If not on list, enter here:	<input type="text"/>

This should be self-explanatory.

# of Meetings	<input type="text" value="1"/>
Meeting Date 1	
Meeting 1 Date	<input type="text" value=""/>
Start & End Time	<input type="text" value=""/> :00 To <input type="text" value=""/> :00
Meeting #1 Location	<input type="text" value=""/>
Sub Needed for Date #1	<input type="checkbox"/> Yes <input type="checkbox"/> No
Absence Start/End Time	<input type="text" value=""/> :00 To <input type="text" value=""/> :00
Location of Absence	<input type="text" value="Assistant Superintendents"/>

- # of Meetings: Enter the number of **DAYS** for your conference.
- Meeting 1 Date: This data will need to be entered for each day. Use the calendar provided to format the date correctly.
- Start & End Time: Enter the times for the conference.
- Meeting Location: City and State required. Actual location, e.g. Melville Marriott, helpful.
- Sub Needed: Self explanatory.
- Absence Start/End: Enter the hours the sub will be needed.
- Location of Absence: Enter the building you will physically be absent from.

Further Absence Information	
Total School Days at Conference (May not exceed 3)	<input type="text" value=""/>
Total Non-School Days at Conference	<input type="text" value=""/>

Enter the above information above **NUMERICALLY**.

Provider	
Provider	<input type="text" value="--- Click To Select ---"/>
If NOT On List Enter Here	<input type="text" value=""/>

Provider: The provider is the *organization* conducting the event. If not listed in dropdown, select “Not on List” and enter the full name not the acronym in the box provided.

Estimated Costs

Reimbursement will be made for eligible expenses only. An eligible expense is one that is reasonable and customary and directly related to conference attendance. All eligible expenses MUST be supported by original, dated, and itemized receipts.

Registration Fee

Estimated Lodging

Estimated Meals

Estimated Transportation

Mode of Transportation PLANE (COACH FARE ONLY)
 TRAIN (COACH FARE ONLY)
 BUS (COACH FARE ONLY)
 CAR RENTAL (ECONOMY CLASS ONLY)
 PERSONAL CAR (TOTAL MILES X RATE PER MILE)

Estimated Tolls

It is your responsibility to know District policy regarding conference reimbursement which can be found on the district website.

- Be as accurate as possible when estimating. **DO NOT TOTAL.** MLP does it for you.
- Research best airfare, determine mileage (don't forget to double) and be sure to shop for the most economical options available. i.e. use a hotel shuttle versus a cab or car rental. LIRR and subway versus driving, tolls and parking.
- Feel free to use the comment box for additional information, etc.
-

Payment/Funding Option

Funded By

Payment/Funding Option: **THIS IS IMPORTANT.** This impacts the approval routing!
See page 2. If there is any doubt, contact the Superintendent's office.

The routing process is one of the most difficult features to set up in MLP because there are so many variables. It is also the major culprit in delaying approval. Always review the approver names that appear immediately following your submission. If something doesn't look right, contact the Superintendent's office.

Professional Development Hours Claimed by Requestor (enter numerically)

Required if tracking professional development hours for certification purposes. Hours reported here should exclude any non-PD time spent at this activity such as lunch break.

Hours

Hours: **ENTER NUMERICALLY!** Deduct lunch & break times.
You will not be credited with PD hours if this left blank.

Goal(s) and Objective(s)

Select At Least One District Objective **Goal : Professional Development**

- [Departmental Issues](#)
- [Literacy](#)
- [Personal Development](#)
- [Pupil Personnel Services](#)
- [Standards & Assessments](#)
- [Teaching Strategies](#)
- [Technology](#)

Goals & Objectives: You must select at least one.

Comments

Comments

Comments: Use this section to “speak” with your approvers and to provide additional details which may assist one or more approvers in expeditiously handling your request.

Submit: Click “submit”. A similar view of the following will appear:
7.

Acknowledgement

I understand that as of January 4, 2010, in order to be reimbursed for conference expenses, all conference requests MUST be submitted a minimum of two weeks prior to the date of the conference. If my request does not comply with this timeframe but I still wish to be considered for reimbursement, I will provide an explanation in the comment box of this request. Although my explanation will be considered, I am aware that:

- A conference report is required regardless of whether reimbursement is involved.
- Reimbursement may be denied by an administrator or the internal claims auditor if my request does not comply with district policy, state law or financial protocol, or, if my request requires a confirming purchase order.
- Denial of reimbursement could occur after already having incurred the conference expenses.
- A denial of reimbursement is not a denial of attendance. As long as I receive approval from my building level administrator (or district level, if appropriate), I may attend the conference at my own expense.
- All claims must be filed within 90 days of attending a conference, and absent an approved reason for not doing so, I may not be reimbursed.
- A certificate of attendance/completion (in addition to proof of registration payment) must be included with my claim submission or reimbursement will be denied.

_____ I ACKNOWLEDGE I HAVE READ THE ABOVE

READ this acknowledgement and do as instructed. Please do not simply check off the box. This acknowledgement has pertinent information.

File Attachment(s)

This feature allows you to attach your backup documentation for this conference if you do not have a URL where it can be obtained by central administration. In order to attach your document(s), they must first be uploaded to My File Library on your left menu of your MLP homepage. Then select the document(s) from the list below.

Please select:

File(s) only appear in this section if you have uploaded one or more documents to your personal File Library. Whatever documents you upload into your Library will appear in this box on any form that has a File Attachment section to it unless you *archive* the file after attaching it to your request. (See separate instructions for My File Library).

8.
(05/12)

As soon as you 'submit' your request, the following appears:

Confirmation		
Confirmation		
Request Submitted!		
Approval Summary		
	1. Tony (test) Curriculum (test)	PENDING
Prior Approval(s)	2. Tom Murphy	-----
	3. Lisa Palemire	-----
Final Approval(s)	4. Tom Murphy	-----
	5. Robert Hawkins	-----
Note: If the approval routing is incorrect, review your User Profile settings and resubmit the form.		
Activity Dates		
Activity Title: test123		
Start/End Date: September 1, 2008		
Actions		
You can monitor the status of your request by logging into your account and clicking the request title.		
RETURN TO MAIN		

Always review the list of names which appears immediately after submitting your request.
 If something looks wrong, contact the Superintendent's office immediately.

Prior Approval(s): These are the people approving your request to **attend** the conference. Until you see **“Completed”** next to each Prior Approver, **you are NOT AUTHORIZED to attend the conference.**

Final Approval(s): These are the people who will review your *conference report* & *final expenses*, when you submit this information following the conference.

After submitting a request, it is advisable to log into MLP **DAILY** to check the status of your request. If you notice it has been sitting with an approver for more than a day or two, follow up. It is your responsibility to ensure you have all your approvals before attending a conference.

Finalizing your conference after attending:

- The finalizing step is required for ALL conferences regardless of whether reimbursement is involved.
- The finalizing step is necessary to get for your conference to show as **completed**.
- **Completed** is necessary to be reimbursed, if applicable.
- **Completed** is necessary for the hours to be reported to the state for your certification.

To finalize:

Log onto MLP and click on the title of the conference you just attended and the following will appear. You may need to scroll down slightly to get to the Actions section:

Activity Status

Activity Info:

Teaching with all your heart and soul.

Date: **Aug 4'08 – Aug 4'08**

Hours: **3.00**

Registration Fee: **\$0**

Approval Status:

Administrator	Approval Type	Comments	Status
Alice McMahon	Pre-Approval		APPROVED
Charles Applebee	Final Approval		
Maria Martinez	Final Approval		

If you have any questions regarding your organization's approval of this request, please contact the appropriate approver(s) listed above.

Actions

[Conference Report](#)

Please complete this Form.

Mark Complete

Select this option when you have completed the activity and the evaluation form(s) and you wish to request final approval. This option will become available once the evaluation is completed.

[View/Print Form](#)

Select this function to view or print the full request form.

Drop

Select this if you wish to DROP enrollment in this activity.

There are TWO steps to finalizing a conference -- the Conference Report & Mark Complete.

First, you click on [Conference Report](#). There will be a text box and a few Yes/No questions. The text box is not infinite. If you like to type lengthier conference reports, it is suggested you do so in Word and upload it as a file to MLP and attach it to your conference request form. In the conference report text box indicate that the report is attached as a file.

Upon saving your Conference Report, you are brought back to the previous view (see above). The “Mark Complete” is now an active link and you must select it. The following will appear:

Activity Completion			
General Info			
User McMahon , Alice			
Building XYZ Elementary Building			
Submitted 8/18/2008 11:11 am			
Expense Summary			
Description	Requested	Approved	Final
Registration Fee	240.00	240.00	<input type="text" value="240.00"/>
Transportation	13.50	13.50	<input type="text" value="13.50"/>
Tolls	\$0.00	-----	<input type="text" value="0"/>
Meals	15.00	15.	<input type="text" value="0"/>
Lodging	\$0.00	-----	<input type="text" value="0"/>
Other Expense 1	\$0.00	-----	<input type="text" value="0"/>
Other Expense 2	\$0.00	-----	<input type="text" value="0"/>
Other Expense 3	\$0.00	-----	<input type="text" value="0"/>
Totals	\$0.00	\$0.00	

11. (05/12)

Comments

Comments

Note: I did not realize lunch was included with the conference. Alice



Finish

SUBMIT

1. Final Column: It is not required that you fill in your final expenses. You can simply submit. However, **if you estimated expenses and then decide to not submit a claim YOU MUST SAY THIS in the Comment Box; otherwise, central administration will not mark your conference completed because they are expecting a claim to be sent in.**
2. Click "SUBMIT"
3. Complete your claim form/trip expense forms, attach ORIGINAL receipts, obtain your administrator's signature and forward to the Payroll Department.

***During the Mark Complete process you will see links to the claim & trip expense report forms for your convenience. You can also get them from the file library in MLP or off the district website.
Claims must be submitted within 90 days.***

You will receive an email from MLP once the last person listed under Final Approval(s) has approved it.

If you have done your conference report, marked it complete and forwarded your claim form but it doesn't appear as **completed** in MLP, you have a problem and you must address it.