

IN-COUNTY REGISTRATION FORM FOR SEMINAR/WORKSHOP/CONFERENCE



City of Phoenix

**REFER TO THE GUIDELINES ON THE BACK SIDE OF THIS FORM PRIOR TO COMPLETING
(REFER TO ARs 2.51, 2.281, & 3.41)**

Job Share
Yes No

| | | | | |
|-------------|-----------------------------|-----------|---------------------|--------------------|
| EMPLOYEE ID | EMPLOYEE NAME (LAST, FIRST) | JOB TITLE | DEPARTMENT/DIVISION | WORK/CONTACT PHONE |
|-------------|-----------------------------|-----------|---------------------|--------------------|

| STEP 1 SEMINAR/WORKSHOP/CONFERENCE | STEP 2 TRAINING DATES | STEP 3 REGISTRATION COST |
|---|--|--------------------------|
| TITLE: _____ LOCATION OF TRAINING (city): _____ | START: ____/____/____ END: ____/____/____ | AMOUNT: \$ _____ |

| STEP 4 PAYMENT TYPE | STEP 5 PAYMENT INFORMATION |
|--|--|
| EMPLOYEE REIMBURSEMENT <input type="checkbox"/> OR DIRECT PAY TO VENDOR <input type="checkbox"/> Must be \$100 or more for EDF "Direct Pay" only. Receipts required Attach 2 copies of the invoice or completed registration form, which must include seminar cost, mailing address, and payee information. | PAYEE: _____ MAILING ADDRESS: _____ |

| STEP 6 FUNDING SOURCE(s) - CHECK ALL THAT APPLY | AMOUNT – IF USING MULTIPLE FUNDING SOURCES, SPECIFY EACH AMOUNT BY SOURCE | |
|---|---|--|
| <input type="checkbox"/> EMPLOYEE DEVELOPMENT FUND (EDF) Allow up to 30 days for processing | \$ _____ | Send original In-County Registration form, with required documentation attached, to Personnel/Employee Development, 135 N. 2nd Avenue, 3rd floor. |
| <input type="checkbox"/> PERSONAL CHECK TO ACCOMPANY EDF REQUEST | \$ _____ | Attach personal check when employee is paying a portion of the registration fee out-of-pocket to complete payment to vendor ("Direct Pay"). |
| <input type="checkbox"/> DEPARTMENT FUNDS Allow up to 5 days for processing | \$ _____ | Send completed Payment Control Document (PCD) with original In-County Registration form, and all required documentation, to Finance/Accounts Payable, 251 W. Washington, 5th floor. |
| <input type="checkbox"/> PERSONAL CHECK TO ACCOMPANY REQUEST | \$ _____ | Attach personal check when employee is paying a portion of the registration fee out-of-pocket to complete payment to vendor ("Direct Pay"). |
| <input type="checkbox"/> MANAGEMENT DEVELOPMENT FUND (MDF) Allow up to 5 days for processing | \$ _____ | Send completed Payment Control Document (PCD) with original In-County Registration form, and attach required documentation, to Finance/Utilities Accounting-Travel, 305 W. Washington. |
| <input type="checkbox"/> PERSONAL CHECK TO ACCOMPANY MDF REQUEST | \$ _____ | Attach personal check when employee is paying a portion of the registration fee out-of-pocket to complete payment to vendor ("Direct Pay"). |

**STEP 7
MAKE ALL NECESSARY PRE-REGISTRATION ARRANGEMENTS WHEN REQUESTING "DIRECT PAY" TO VENDOR**

| | | |
|---------------------------|----------------------|--|
| Employee Signature: _____ | Date: ____/____/____ | By signing, you are indicating that you are in compliance with City of Phoenix ARs 2.51, 2.281, & 3.41 |
|---------------------------|----------------------|--|

| | |
|--|----------------------|
| Department Head or Authorized Signatory: _____ | Date: ____/____/____ |
|--|----------------------|

Notes:

DISTRIBUTION:
ORIGINAL – PRIMARY FUNDING SOURCE
COPY – IF APPLICABLE, SECONDARY FUNDING SOURCE
COPY – DEPARTMENT OR FUNCTION
COPY – EMPLOYEE

| For Office Use Only | |
|---------------------|---------------|
| Claim No: _____ | Amount: _____ |

GUIDELINES FOR IN-COUNTY REGISTRATION FORM

Refer to AR 2.51 for additional information regarding the Employee Development Fund program criteria.
Refer to AR 2.281 for information regarding the Management Development Fund program.

Eligible employees below the level of Middle Manager must use this form to request employee reimbursement or direct payment to a vendor ("Direct Pay") for **in-county seminar/workshop/conference registration expenses using Employee Development Funds (EDF)**.

Executives, Middle Managers, Elected Officials, Boards and Commission members, and volunteers may use this form to request employee reimbursement or direct payment to a vendor ("Direct Pay") for **in-county seminar/workshop/conference registration expenses using Management Development Funds (MDF) or Department Funding sources**.

REQUIRED FORMS AND DOCUMENTATION

Only use this form for all **in-county** seminar/workshop/conference registration expenses.

Complete the top line of personal information on the form. By signing the form you are affirming that the information you have provided is complete and correct, and that you have complied with all applicable rules and regulations covered under ARs 2.51, 2.281, and 3.41.

- For Employee Development Funds (EDF), submit requests to Personnel/Employee Development.
- For Department Funds, submit to Finance/Accounts Payable.
- For Management Development Funds (MDF), submit to Finance/Utilities Accounting.
- For more than one funding source, submit original form to the primary funding source and a copy of your request to the secondary funding source.

All seminars/workshops/conferences must contain an educational component and be job-related.

Complete Steps 1 – 7:

Step 1: Enter the title of the seminar/workshop/conference and the location (city) where you will attend this training.

Step 2: Enter the training dates of the seminar/workshop/conference.

Step 3: Enter the amount of the seminar/workshop/conference registration fee.

Step 4: Indicate, by checking the appropriate box, if this request is to reimburse you or to pay the vendor directly (Direct Pay").

Step 5: If this request is a "Direct Pay," enter the payee's name and mailing address.

Step 6: Indicate all funding sources and the amounts that apply for this seminar/workshop/conference request. This should equal the amount in Step 3. If applicable, you may attach a personal check for any portion being paid by you for registration, to accompany payment to the vendor.

Step 7: When requesting a "Direct Pay" be sure to **make all your pre-registration arrangements prior to submitting for payment**. Be sure to sign and date the form and obtain the required approval signature.

WHERE TO SUBMIT YOUR REQUEST

For EDF Only - Have your Department Head approve, sign, and date this request. Attach your registration material including a description of the seminar and all receipts necessary to document proof of payment. For "Direct Pay" requests, include 2 copies of the completed registration form or invoice, which must include payee and mailing address information. **Make all necessary pre-registration arrangements**. Sign and date the form and once approved, submit it to the Personnel Department/Employee Development, 3rd Floor, 135 N. 2nd Avenue, 602-262-6401. Keep a copy for your records.

For EDF and/or Department Funds and/or Personnel Check - Step 6 allows you to indicate all funding sources. A copy of the required documents must be sent to Personnel for EDF processing and Accounts Payable for Department Fund processing, and just Personnel for EDF with personal check processing. Keep a copy for your records.

For Department Funds Only - Have your Department Head or other appropriate signee approve, sign, and date this request. Attach your registration material including a description of the seminar and all receipts necessary to document proof of payment. For "Direct Pay" requests, include 2 copies of the completed registration form or invoice, which must include payee and mailing address information. Make all necessary pre-registration arrangements. Attach Payment Control Document (PCD) for reimbursement or "Direct Pay." Submit all originals to Finance/Accounts Payable, 5th Floor, Calvin Goode, 251 W. Washington Street, 602-262-6675. Keep a copy for your records.

For MDF Only - Have your Department Head or other appropriate signee approve, sign, and date this request. Attach your registration material including a description of the seminar and all receipts necessary to document proof of payment. For "Direct Pay" requests, include 2 copies of the completed registration form or invoice, which must include payee and mailing address information. Make all necessary pre-registration arrangements. Attach the Payment Control Document (PCD) for reimbursement or "Direct Pay." Submit all originals to Finance/Utilities Accounting - Travel, 305 W. Washington Street, 602-262-6885. Keep a copy for your records.

For MDF and/or Department Funds and/or Personal Check - Step 6 allows you to indicate all funding sources. A copy of the required documents must be sent to Finance/Utilities Accounting - Travel for MDF and Accounts Payable for Department Fund processing and just Finance/Utilities Accounting - Travel for MDF with personal check processing. Keep a copy for your records.