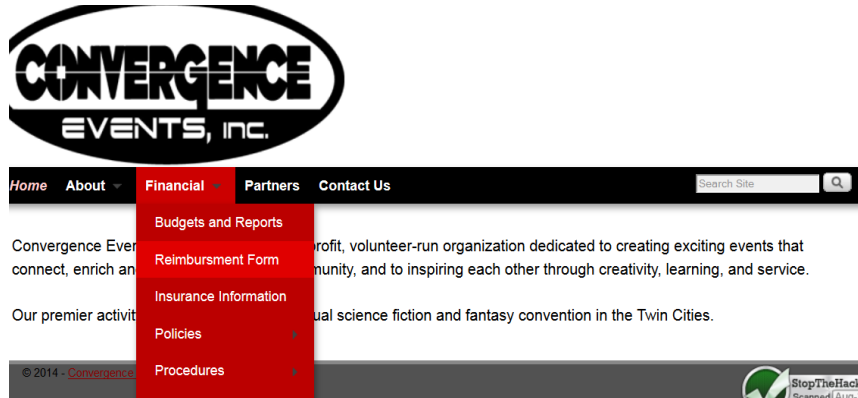# Step by Step Guide to Completing the Convergence Events Reimbursement Form

The reimbursement form can be downloaded from the Convergence Events website. Go to www.convergenceevents.org . Under the **Financial** tab, select **Reimbursement Form**.

It should be noted that the reimbursement request form has fillable forms, and so can either be completed by hand or electronically.

Step 1: Delivery Method

The first step in filling out the reimbursement request form is to enter the date you are submitting your request and your preferred delivery method. In the upper right hand corner of the form you will find a blank for the date and two check boxes.

If no delivery method is indicated, the default is to mail the check. It is possible, if a reimbursement request is submitted at a concom meeting, that a check may be ready for pickup at the same meeting, but this is not guaranteed.

Last Updated: Wednesday, August 20, 2014

Step 2: Personal Information

The next step in filling out a reimbursement request form is to enter your personal information. <u>All fields must be completed, and must be legible.</u>

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

If the Finance Department Head cannot read your personal information, your request may be delayed or denied. Please do not assume that the Finance Department Head will know who submitted a form or that your reimbursement will not be mailed.

Step 3: Reimbursement Details

After entering your personal information, you will next enter the details of your reimbursement request.

Department/Budget to be Charged	Amount

Under the **Department/Budget to be Charged** you will enter the department budget line. If you are not sure what budget line to enter here, please ask your Department Head. This area is *not* a location to describe your spending.

It is acceptable to submit a single reimbursement request for multiple departments. For example, if you purchased tape that will be charged to multiple departments you would enter each department on its own line.

Under the **Amount** column you will enter the amount for each entry you made in the **Department/Budget to be Charged** column. After all lines have been entered, <u>please add up all amounts in the **Amount** column and enter this amount in the</u> Total _____ line.

If you have multiple receipts for the same department, it is acceptable to either combine them all into one line or to give each receipt its own line.

The next page will show acceptable and unacceptable examples of this section.

Acceptable

Department/Budget to be Charged	Amount
Operations	$ 14.23
Operations	$ 25.00
Operations	$ 43.50

Department/Budget to be Charged	Amount
Operations	$ 82.73

Department/Budget to be Charged	Amount
ConSuite	$ 50.00
VolDen	$ 45.00
CoF2E2	$ 12.50

Unacceptable

Department/Budget to be Charged	Amount
CONvergence	$ 23.32

Department/Budget to be Charged	Amount
ConSuite, F2E2, Den	$ 643.20

Department/Budget to be Charged	Amount
paper and ink for printing	$ 53.28

Last Updated: Wednesday, August 20, 2014

Step 4: Description of Spending

After you have entered the budgets to be charged and amounts, you will describe your spending. This description does not need to be exhaustive, but should be descriptive enough to be easy to understand. The description should be clear enough that the purpose of the reimbursement should be clear at a glance a year later when budgets are being considered.

Description of Spending

Step 5: Submission and Authorization

After the above steps have been completed, the reimbursement request must be submitted and authorized. Parts of this step will differ depending on how the request is being submitted.

Submission by Hand

If the reimbursement request is being submitted by hand (given to Finance Department Head at a concom meeting, dropped off in dropbox on the Bridge at con, etc), please follow these steps:

1. Bring your reimbursement request and documentation to your Department Head or Co-Head. He or She will review your request and then if all is correct authorize it by signing the form.
    Authorization _____
    Department (Co-)Head, Director, CE Board Representative, Head of Finance, or CE Chief Financial Officer
2. After your reimbursement request has been authorized, either give to the Finance Department Head (in the case of being at a concom meeting) or place in a provided envelope and place in dropbox (in the case of being at the convention).

Submission by Email

If the reimbursement request is being submitted via email, please follow these steps:

1. Make sure you have electronic versions of all documentation as well as the reimbursement request form. Scan physical receipts or invoices, make copies of emails, etc.
2. Send an email to both your Department Head and the Finance Department (finance@convergence-con.org) asking your Department Head to authorize your request. Include your completed reimbursement request form along with all documentation as attachments.
3. After receiving an email authorization, the Finance Department Head will issue a check.

Last Updated: Wednesday, August 20, 2014

Reminder: No individual may authorize their own reimbursement request. If you are the only Department Head, you must submit your reimbursement request to your divisional Director. Requests not authorized by a second person will be denied.