**Revised 12/2/15**

**CONFERENCE MANAGEMENT AT JLAB**

**Travel Coordinator Process**

***DEFINITION OF CONFERENCE:***

Revised Guidance – 17-Aug-2015

“Conference” is defined in the Federal Travel Regulation (FTR) as, “ . . . meeting, retreat, seminar, symposium, or event that involves attendee travel. The term ‘conference’ also applies to training activities that are considered to be conferences under 5 C.F.R 410.404.”

**What are the characteristics of a ‘conference’?**

1) Not always referred to by the name ‘conference’. Other common terms used are:

Exposition Seminar Symposium

Workshop Meeting Retreat

Exhibition Convention

1. Typically involve topical matters of interest to, and the participants of, multiple agencies and/or non-governmental participations.

3) Most often include but are not limited to registration, published agenda, scheduled speakers, or discussion panels.

4) Generally have fee’s associated with attendance,

a. Registration

b. Exhibitor

c. Sponsor

d. Conference fee

5) Typically involve travel but a local event may also qualify as a conference if it exhibits other key characteristics of a conference, especially when it involves the payment of a fee.

Individual events may qualify as conferences without meeting all of the characteristics listed above, but will generally meet some of them.

NOTE: Fort the purpose of this guidance, some training events qualify as conferences. For example, if the training is offered in conjunction with a conference, qualify for credits or the participant needs/desires to fulfill a Job Related Training (JRT) requirement at the Lab

**WHAT IS EXEMPT?**

**Meetings necessary to carry out statutory oversight functions –** examples: investigations, inspections, audits, or non-conference planning site visits.

**Meetings to consider internal agency business matters held in Federal facilities,** such as those that take place as part of an organization’s regular course of business, do not exhibit the characteristics of a formal conference, and take place in a Federal facility.

**Other Meetings** such as,

Advisory Committee and Federal Advisory Committee meetings,

Solicitation/Funding Opportunity Announcement Review Board meetings,

Peer review/objective review panel meetings,

Evaluation panel/board meetings, and

Program kick-off and review meetings (including those for grants and contracts).

**Bi-lateral and multi-lateral international cooperation engagements** that are focused on diplomatic relations.

**Formal classroom training**, such as the USPAS, SLLP, regular courses of instruction or training seminars at the National Training Center, and the HAMMER training facility at Hanford, and regular courses of instruction or training seminars conducted by the Office of Management for Acquisition Workforce related to the core activities of the Department.

**Classroom training available through Federal and commercial** sources required as part of a certification program required for the performance of an employee’s position which does not exhibit the characteristics of a conference.

IF YOUR EVENT MEET ANY OF THE CRITERIAS IN EXEMPTIONS, DO NOT ADD THE EVENT IN THE PROJECTION DATABASE

**ADDING A CONFERENCE TO THE DATABASE** – (TA System – Projected Travel) –

 a. Check to see if the conference is already in the database.

 Enter as much of the information onto the screen as possible. The more you enter the fewer choices will appear.

b. INSERT new conference? Will display if no conferences is found that match the

 parameters entered.

 c. Otherwise, select the correct conference from the list provided. To add projections

(see #10 below), OR

 d. Once added or verified you are ready to create a TA.

**CREATE TRAVEL AUTHORIZATION (TA)** – Immediately Start TA when it is learned there is someone traveling from the Lab to a conference.

**CONF box** -

If one of the exceptions apply, indicate NO in the Attending Event box.

Otherwise, indicate NON-DOE, not trng or DOE, not trng or Other Qualifying Event. When any these options are selected the conference information box will be displayed.

 Select a conference from the drop down box. Complete the *REASON FOR ATTENDING.*

If the conference is not displayed,

1. Check the dates of travel on the TA, if they are correct
2. Add the event using the instructions above

Enter the TA **Travel Requirements** - estimate the cost including airfare; car rental; lodging based on conference hotel or recommended hotels if list, otherwise lodging per diem is acceptable; reg. fee, if applicable.

Review the warnings at the bottom of the TA before continuing -

Click DONE

**CRITICAL SUSPENSE DATES – be sure to observe the critical dates matrix posted on the Travel “Conference tab” website.**

**WHEN TO SUBMIT THE TRIP** - POA approval can and should be obtained as soon as possible. Once the conference is approved the TA will be released so expenses can be incurred. (Funds can not be obligated until conference approval is obtained).

If the trip is not in Waiting for Approval (WAPPR) status after 15 days of being created the preparer will receive an error message that the trip is UNSUBMITTED. To avoid receiving this message again, submit the trip for POA approval.

***REMEMBER***: Until conference approval is obtained and the trip is fully approved (released to SUBMITTED status) no costs can be incurred or reimbursed.

**CONFERENCE APPROVAL**  - When an event and projections are added to the database it will be reviewed by TS to determine whether it does not need to be reported to DOE or if an exemption applies.

If either is met the event will NOT be entered to the Conference spreadsheet.

* If qualifying DOE or DOE/contractor sponsored the conference attendance will be reported to DOE through their on-line Conference management tool (CMT).
* If the lock-out date has already passed (60 days prior to event start date or Early Registration Date) and the aggregate cost threshold has not been reached the TA’s will be released. The event will NOT be entered to the Conference spreadsheet.
* If the conference requires approval the Conference Approval spreadsheet will be updated to add the conference to the “Not-Approved” section.

**APPROVAL NOTIFICATION** – when conference approval is received the TA preparer will be notified via the TA system when the TA is released. If there is no TA or the TA has not received POA approval yet the TA preparer will be notified via email. The approved document will be kept on file in Travel Services in case there is ever a question about the approval being obtained.

**TRAVEL ARRANGEMENTS** – can NOT be made prior to approval and until the TA has been released. If the conference is to a sensitive foreign country the TA will not be released until foreign travel and conference approval have been obtained.

**PROJECTION ATTENDANCE** – when adding the conference or creating a TA for someone not already on the projections, follow the same instructions to locate the conference as identified in step 1 of this document.

 To add a projection – scroll down from the conference information being displayed

* Enter the last name and then the first name of the traveler.
* A list of names will be displayed that match your entry.
* Select the correct one from the list (the selection will be highlighted but will not fill the entry box).
* Tab to the Funding Source box.
* If DOE is entered the PROJ and ORG being charged on the TA will also be needed.
* Tab to Reason for Attending and chose from the drop down.
* Next enter the estimated cost in whole dollars that will come as close to the TA as possible (TA = $2,469.50; enter $2,500).
* Click ADD.

Once added the projection can be updated or removed as needed. When a trip is canceled always be sure to remove the Projection to avoid unnecessary work if an approval or re-approval is not necessary.

UNABLE TO ADD A PROJECTION? This means the event has already been reported to DOE through the CMT system. A request to add additional attendance should be made via email to confcorr@jlab.org. An email response will be sent within 3 business days letting you know the status of the request. If no email is sent, send an email to “confcorr” and copy the Travel Supervisor asking for an update.

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