

E.P.E.C CHECK LIST
PRE-EVENT

- [] Obtain verbal or preferably email ok to attend function from your division head.
- [] Fill out EPEC form found on the "X" of your county PC in the EPEC folder file with all pertinent information including estimates for expenses.
- [] If airfare or train fare is necessary, obtain quotes from the Airline/Amtrack direct PLUS a second quote from the County approved travel agent(s). Agent(s) info can be found at <http://ucnjwebsec:84/index.php/epecs/>. Attach travel quotes to EPEC.
- [] Obtain requisition number(s) and the signature of Department/Division Head on EPEC form.
- [] If applicable, write a detailed request to attend event on County letterhead and send EPEC and letter to the Office of the County Manager. Fully outline how the event will directly enhance the performance of your work duties.
- [] If and when the EPEC comes back signed and approved by your Department Head and the County Manager, you may then proceed to make the necessary arrangements.
- [] Pay for approved registrations, lodging and book travel, preferably by Purchase Order, if not, use personal credit card, check or cash. Proof of the tender form of payment must be provided.

NOTE: Airlines and/or travel agent may not be able to hold quoted prices; recheck both and use lowest price. If you intend to use a County vehicle for travel, a request form must be sent to Administrative Services.

POST-EVENT

- [] Reimbursement requests to pay for registrations, lodging or travel expenses that could not be prepaid directly to the vendor must be drawdown from existing blanket purchase order.
- [] Employee must include actual expenses on EPEC and sign it. Employee signs Reimbursement Purchase Order as the Claimant. The Department/Division Head must be one of the two authorized signatures on the Purchase Order. An employee **cannot** sign a Purchase Order as both the Claimant and an Authorized Signature.
- [] If applicable, a follow-up letter to County Manager should be attached to the EPEC. The letter should document in detail the educational goals that were met by the employee's attendance at the event including dates and times of attendance of classes as well as confirming documentation, i.e. CEU's.
- [] Send completed the completed Purchase Order/Draw Down package to the County Manager. It should include the following:
 - [] EPEC - final with all signatures and actual amounts filled in.
 - [] Purchase order - with all signatures
 - [] Detailed receipts - food, lodging and travel
 - [] Proof of tender form of payment, (e.g. credit card statement, cancelled check or cash/credit card sales receipt).
 - [] If applicable, follow-up letter
- [] After County Manager approval, package is sent to Finance for approval of the receipts. Finance will correct any problems and send check to employee.