

AUTHORIZATION FOR TRAVEL/CONFERENCE ATTENDANCE FORM SUBMISSION GUIDE

Effective Monday, March 9, 2020, the Authorization for Travel/Conference Attendance Form will be migrated to an electronic submission format, and paper forms will no longer be accepted. Additionally, a revised Board Policy with regard to travel and travel expenses will be implemented with the updated form.

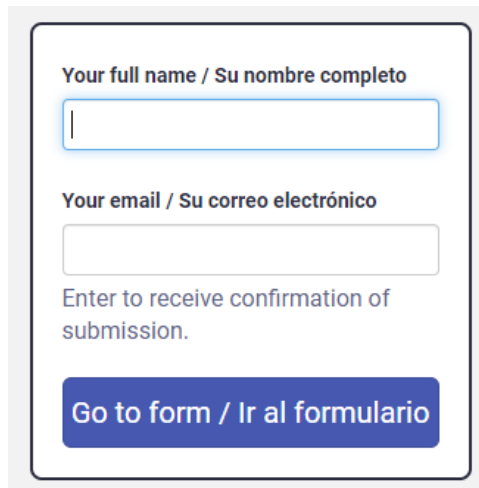
The updated policy is available here:

<http://www.gamutonline.net/district/whart/DisplayPolicy/957187/3>

Links to the Authorization for Travel/Conference Attendance Form are available on the District website under Departments/Business Services/Forms or Staff/Staff Resources.

INITIATING A NEW FORM

When initiating the form, you will need to complete your name, as the employee, and your email address prior to going into the form:



Note: If you are completing this form on behalf of another employee, please enter the other employee's name and email address.

COMPLETING THE FORM

The fields that have red boxes around them are required to be completed to submit the form. If they are not completed, you will not be able to route your form for approval.



WM. S. HART UNION HIGH SCHOOL DISTRICT AUTHORIZATION FOR TRAVEL/CONFERENCE ATTENDANCE FORM

EMPLOYEE NAME: DATE: 03/02/2020

JOB ASSIGNMENT: WORKSITE/DEPARTMENT:

CONFERENCE/MEETING TITLE:

LOCATION/ADDRESS:

DATES OF ATTENDANCE (MM/DD/YYYY): FROM TO NO. DAYS:

To be eligible for travel reimbursement, this form shall be properly completed and submitted for approval no

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ACCOUNTING CODE(S)					
FUND	RESOURCE/PY	GOAL	FUNCTION	OBJECT	LOCATION
Accounting: _____ (initial/date)		Accounts Payable: _____ (initial/date)		Director of Fiscal Services/Date _____	

- The following items must be attached to your Authorization for Travel/Conference Attendance Form:
 - Conference Agenda/Flyer
 - Google maps for any anticipated mileage
- Once you have completed your form, you will need to sign the bottom of the form as the employee. Click the button that says, “Click to sign here.”

Click to sign here
03/02/2020

Employee
Date

For first time users, a box will pop up, allowing you to type in your name and select a signature type. Once you complete that box, click on the “add signature” button to sign the form. For all other users, your signature may have been saved by the system.

✕

Type your name

Jane Doe

Review your signature

Use Typed
Draw It

Save signature for future use

By clicking 'Add signature' you accept the terms of this document and agree to Informed K12's [Terms of Use](#).
 If you do not wish to sign this form electronically, [click here](#).

remove
Add signature

Note: If you are completing the form on behalf of another employee, instead of submitting the form, click on the “Save Progress” button at the top of the page. Once you click the “Save

Progress” button, an email will be sent to the other employee, at which point, they can sign the form and route it through approvals.

SUBMITTING FORM

When you click the “Submit Form/Enviar formulario” button, a pop-up window will open asking you the following:

Does this form require SPED, Special Programs, or Career Technical Education (CTE) approval?

If your travel expenses charge any categorical funds, your form must be routed to the program/department before routing to your direct supervisor for approval.

Below are the categorical departments and the resources that should be routed to them:

SPED	Special Programs	CTE
33100.0	07066.0	06350.0
33110.0	30100.0	35500.0
33270.0	30100.8	63780.0
56400.0	30100.9	63870.0
65000.0	31820.0	73700.0
65005.0	40350.0	90001.0
65120.0	41270.0	90051.0
95000.0	42010.0	90053.0
	42030.0	97200.0
	75100.0	97390.0
	90035.0	
	90050.0	

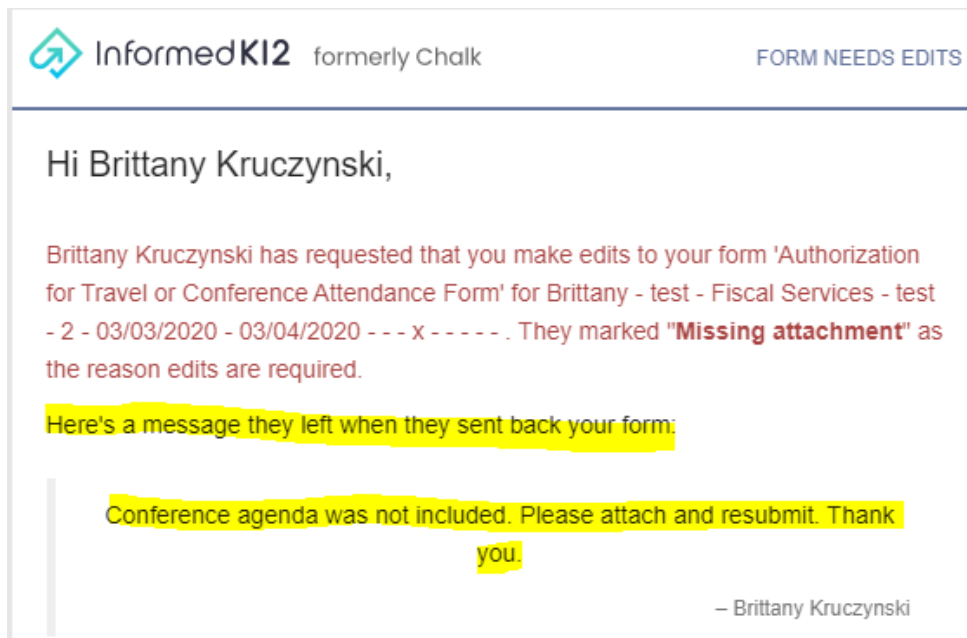
You will find this number in the “RESOURCE/PY” field on the form:

ACCOUNTING CODE					
FUND	RESOURCE/PY	GOAL	FUNCTION	OBJECT	LOCATION
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Accounting: _____ (initial/date)		Accounts Payable: _____ (initial/date)		CFO/Director of Fiscal Services/Date	

If none of these resources apply to your purchases, you can select the “No” button and route the form to your direct supervisor for approval. If your purchases fit into this list, please route to the appropriate department for approval.

Note: Principal’s forms should be routed to the Assistant Superintendent, Educational Services office, for approval.

A review will be completed by each approval step. Should there be any issues with the submission, it will be returned to you with notes, indicating what needs to be updated. You will receive an email notification that will show the information in the body of the email:



Additionally, if you click on the “Access Your Form” button in the body of your email, it will open your form where you can also view the notes.

For security purposes, you must sign in all relevant areas again. You can update and sign your form through the button or link below:

Access Your Form

Link to form: https://app.informedk12.com/docs/99?form_request_id=7771237&token=8ze4ayVfEJF4Qdtu5gCRNCoG

Authorization for Travel or Conference Attendance Form

Back

Initiated 2 minutes ago

🕒 Form history

Currently on Step 1 of 8 (Brittany Kruczynski – bkruczynski@hartdistrict.org)

Sent back from Step 4 to 1 on 03/02/2020 (Missing attachment)

Conference agenda was not included. Please attach and resubmit. Thank you.

– Brittany Kruczynski

Once all approvals are completed, and your form is accepted, you will get an email indicating your form has been completed.

IMPORTANT NOTES:

- Authorization for Travel/Conference Attendance Forms **must** be submitted at least 15 business days prior to departure.
- Meals are reimbursed based on the General Services Administration's (GSA) allowable rate. Itemized receipts are no longer required. Please visit <https://www.gsa.gov/travel/plan-book/per-diem-rates> to get your daily rates. (First and last day of travel are pro-rated at 75%).
- ITEMIZED RECEIPTS ARE REQUIRED FOR ALL FEDERALLY FUNDED TRAVEL.

If you have questions on how to use this form, or you need help retrieving your form, please contact:

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