

# TRAVEL FLOWCHART

## IMPORTANT INFORMATION

**All travel requests MUST be approved prior to the event.** If above \$150 (all costs) must also be Board approved prior to the event. If a staff member travels to an event without prior approval, the professional day will be changed to a non-paid day. Travel undertaken by an employee without prior approval assumes all costs and CANNOT be reimbursed at a later date. Plans should be initiated at least 45 DAYS in advance of the proposed trip (or BOE mtg if BOE approval is required). All travel requires a Post Travel Report to be completed.

**Staff Member initiated travel** - staff member pays all costs up front, submits receipts, completes Post Travel Report, gets reimbursed after travel. District initiated travel - school/district registers staff member via Purchase Order (PO); staff member incurs all other costs; completes Post Travel Report; gets reimbursed after the event.

It is the staff member's responsibility to notify the Principal about changes and/or event cancellation so that the Substitute & Purchase Order can be cancelled. If the request is denied at any point, the request form will be returned to the Principal.

## STAFF MEMBER

Submits Request for Travel Authorization and Registration Form and supporting documentation to Supervisor or Principal (as appropriate). Supervisor forwards to Principal's Office. If the staff member is going out of state, quotes need to be included and the least expensive mode of transportation will need to be used. **Enter request in AESOP.**



## PRINCIPAL'S OFFICE

**(Requests must be submitted, at a minimum, three (3) weeks prior to the next Board of Education Meeting)**

Principal evaluates considering program & budget; approves or rejects request form, if principal has account to be charged, writes account on Request Form. Principal forwards to Director of Curriculum's Office.



## DIRECTOR OF CURRICULUM'S OFFICE

The Director of Curriculum evaluates considering program & budget; approves or denies request -- approves or rejects in AESOP. Director of Curriculum determines Travel Account to be charged, writes account on Request Form & forwards approved form to Business Office. Denied requests are returned to the Principal.



## BUSINESS OFFICE

Business Office reviews for legal compliance and accuracy; approves or denies request form. Business Office forwards approved forms to Superintendent's Office. Denied forms are sent back to Director of Curriculum.



## SUPERINTENDENT'S OFFICE Requests under \$150.00 (all costs)



Superintendent reviews, approves or denies request, sends back to the Principal.



## PRINCIPAL'S OFFICE

Returns request form to Staff Member. **Approve or reject as appropriate or necessary in AESOP.**



## Staff Member Initiated Travel

Staff Member pays all costs up front; submits receipts and Post Travel Report to Accounts Payable and Supervisor/Principal; the staff member receives reimbursement after travel is completed. School completes purchase order (or pays via petty cash if under \$25).



## SUPERINTENDENT'S OFFICE Requests OVER \$150.00 (all costs)



Superintendent reviews, approves or denies request; if approved adds to BOE Agenda for final approval. If denied, request is sent back to the Principal.



## BOARD OF EDUCATION

Board of Education reviews and approves or rejects request. After meeting, Superintendent's Office returns form to Principal's Office.



## School District Initiated Travel

Director of Curriculum's Office creates P.O. for **Registration ONLY**; issues PO to organization directly. Staff member is responsible for all other cost and submits receipts for approved costs incurred and Post Travel Report to Accounts Payable and Supervisor/Principal. School completes purchase order (or pays via petty cash if under \$25) for reimbursement to staff member.