Step-by-Step Overview for Travel Requests

1

1. Create travel request to request for approval to attend the conference/event.
2. Enter all "expected expenses"
3. Enter funding allocation(s)
4. Upload required documents

2

Request will go through budget check

If budget check fails, an email notification is sent to STS and employee

4

Routes to Principal/Site Administrator for approval. Then to the Region Superintendent's Office/Division Chief

If using a different funding cost center, request will also route to that cost center's administrator

5

Routes to Travel Unit for review

Travel Desk is required to reject if information is entered incorrectly or missing documents, or if Request not received 30 days before local/in-state or 45 days before out-of-state/international trips.

6

Routes to Deputy Superintendent and Deputy Superintendent of Instructions.

If out-of-state, then to the Office of Superintendent

7

Upon obtaining approval, Concur request status will change to "**Approved**". Email notification of approval will be sent to STS and employee.

*Email approval replaces ATRN

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Step-by-Step Overview for Expense Reports

1

Traveler compiles all supporting receipts, flyers & other supporting documents.

*The Conference Flyer must be attached again, even if it was attached in the Request.

2

Traveler or Site Travel Specialist (SAA or alternate) enters the expense report into Concur and uploads the required back-up documents. The request is then submitted.

3

Expense report will go through a budget check.

*If the budget check fails, an email notification is sent to STS and employee

4

Routes to Principal/Site Administrator for approval. The report then routes to Accounts Payable for processing of the reimbursement.

*If the funds are coming out of a different cost center, the request will also route to the Administrator of that fund cost center

5

Employee is reimbursed for any out-of-pocket expenses reported via a non-taxable payment in their paycheck.

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