Step-by-Step Overview for Travel Requests

1

Traveler compiles all supporting documentation. Schools must include Division Of Instruction Justification Questions.

Requests not submitted at least 30 days before in-state and 45 days before out-of-state will be rejected.

2

Site Travel Specialist (SAA or alternate) enters the request into Concur and uploads the required backup documents. The request is then submitted.

Freeze Justification selected within the Travel Request. If "Other" is chosen, justification MUST be entered in "Purpose".

3

The request will go through a budget check. Funds must be available on G/L 520002.

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

4

Routes to Principal/Site Administrator for approval. Then go to the Region (for Schools) or the Division Head (for Offices).

If the funds are coming out of a different cost center, the request will also route to that cost center for approval

5

Routes to Travel Unit for review

6

Routes to the Deputy Superintendent of Instruction. For Freeze approval.

If the trip is out-of-state, the request will also route to the Office of the Superintendent

7

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

Email approval replaces the 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.

*Freeze approval is required

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.