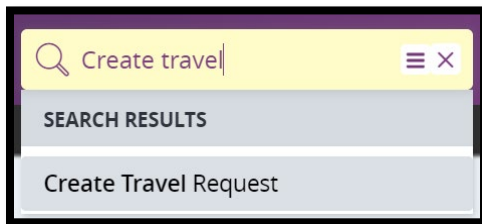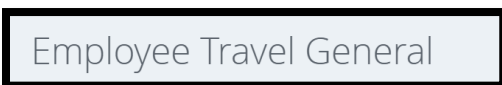# Create Travel Request

> *THE PURPOSE OF A TRAVEL REQUEST IS TO ENCUMBER ANTICIPATED TRAVEL EXPENSES THAT COULD BE INCURRED. INDIVIDUALS CAN PLACE A REQUEST FOR THEMSELVES OR SOMEONE ELSE.*

Login in option 1: Secretary and Bookkeepers – follow this log in

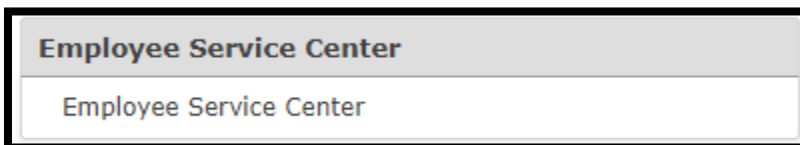Enter **Create Travel Request** in the Search field. Located upper right corner on the purple ribbon.

This pulls up the screen **Employee Travel General**

Login in option 2: Everyone else

- Log into Frontline
- Employee Service Center – on the Dashboard

Employee Service Center Log in – enter credentials

- Select to receive Voice or SMS/Text Identity confirmation

- Enter **Access Code**
- Select - **No, this is a public/shared computer**
- Click, **OKAY**

Frontline Dashboard comes up

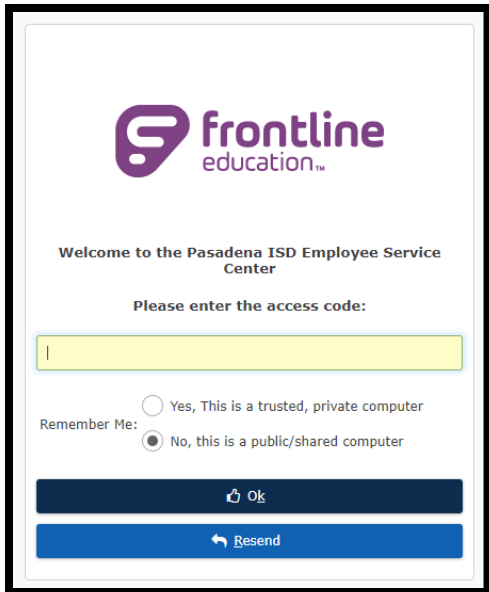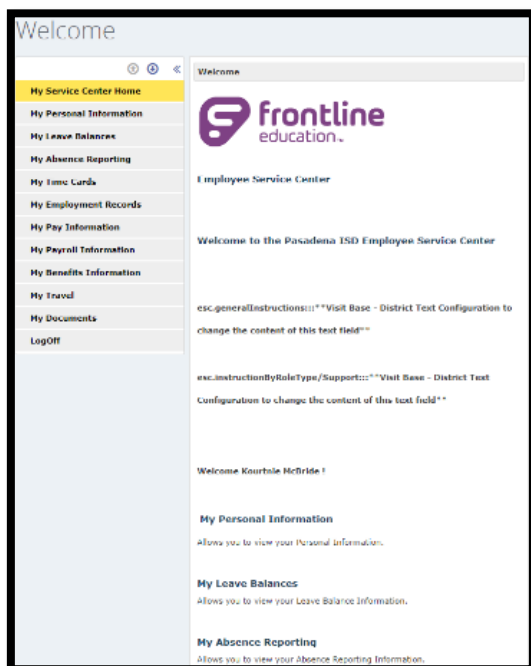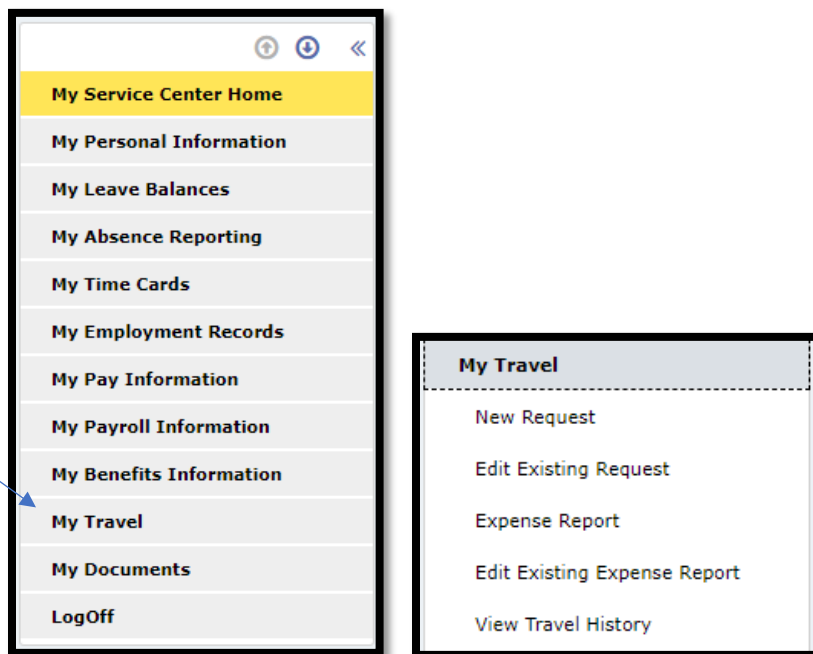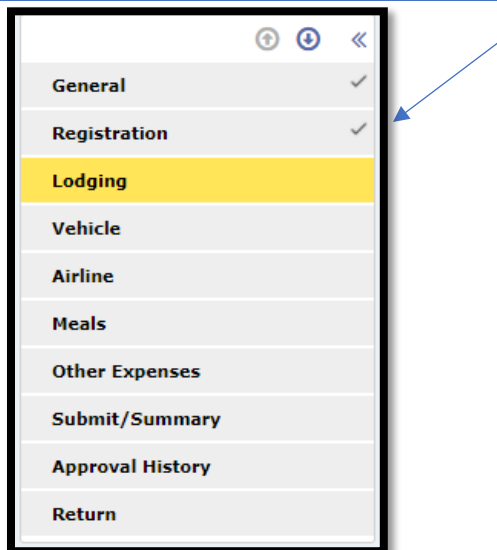|	FRONTLINE PROCEDURES	ENTRY POINT:
(logo) PASADENA INDEPENDENT SCHOOL DISTRICT www.pasadenaisd.org	**FRONTLINE PROCEDURES** Pasadena ISD	Create Travel Request

DATE DEVELOPED: 07/15/2021   REVISED DATE: 10/28/2021

SUBJECT: Travel Request

Select the "**MY TRAVEL**" tab located on the left hand side of the Dashboard
Here you can see the different options – to create a travel request click, "**NEW REQUEST**"

My Service Center Home
My Personal Information
My Leave Balances
My Absence Reporting
My Time Cards
My Employment Records
My Pay Information
My Payroll Information
My Benefits Information
My Travel
My Documents
LogOff

My Travel
New Request
Edit Existing Request
Expense Report
Edit Existing Expense Report
View Travel History

*AS YOU COMPLETE THE TRAVEL CATEGORIES YOU WILL SEE CHECK MARKS NEXT TO THE **TABS**, **WHICH** MEANS THE MODULE HAS BEEN COMPLETED.*

General ✓
Registration ✓
Lodging
Vehicle
Airline
Meals
Other Expenses
Submit/Summary
Approval History
Return

GENERAL CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Traveler: Enter the name or ID number of the individual that will be traveling

Event: currently not used leave blank

Event Number: currently not used leave blank

Activity/Purpose: Name of event

Destination – State/City: Enter State and City where event will take place

Departure – Date/Time: Enter the date and time when leaving for this travel

Return – Date/Time: Enter the date and time when returning from travel

Will an advance of expenses be expected: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Account Type:

> *Employee* – individual traveling is a district employee
> *Non-Employee* – Individual traveling is not a district employee/student, (i.e. chaperone)
> *Student/employee* – Individuals traveling are student and district employee
> *Student* – Individual traveling is district student

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.

Once you enter the General Ledger Account, click **Save Request**

Once saved you will see the Travel Request will be at the bottom of the General Page with a Request ID Number. Click Continue – to move to the next tab.

	Request ID	Event	City	Travel Request Status	Expense Report Status	Next in Workflow	State	Departure Date	Return Date	Reimbursement Expected	Traveler	A
+ ⋮	75	TASA Conference	AUSTIN	Entered	Not Started		TX	11-15-2021	11-17-2021	N	Franklin Moses ( )	

REGISTRATION CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Registration Title: Name of travel event

Begin Date: Enter date the travel will begin

Projected Amount: Amount of Travel Registration

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.

> *General Ledger Account entered on the General Tab will default to all other categories*

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

LODGING CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Hotel/Motel: Use Drop down, select Other

Other Hotel/Motel Name: Enter the name of place of lodging

Phone Number: Enter the contact main phone number of place of lodging

Zip Code/Address Line1/Address Line 2: Enter the address of place of lodging

State/City: Enter the location of place of lodging

Number of Occupants: Enter the number of individuals that will be occupying the place of lodging
Number of Rooms: Enter the number of rooms that will be occupied at the place of lodging
Number of Nights: Enter the number of nights at the place of lodging
Estimated Rate: Enter the nightly rate of place of lodging
Rate is Above GSA: GSA Rates for Lodging when using Federal Funds – Hotel Lodging involving Federal Funds cannot exceed GSA Rates. Hotel Lodging over GSA will be expensed to Local Funds. Additional information on GSA Rates can be found on pages 2 to 3 in the travel manual.
Confirmation Number: Enter the confirmation number if available of place of lodging
Projected Amount: Automatically calculated (Rate X Number of Nights)
General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.
Attachments: Drop, Drag or Upload Supporting Documentation
Notes: Add any additional information related to the travel
Once completed, click **Save and Continue**

VEHICLE CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Cost will be reimbursed to the individual traveling

Vehicle Type:

Personal - Individual traveling is using personal car. System will require you to enter number of miles traveled.

Rental – Individual traveling will be renting a vehicle. System will require you to enter rental Information "Rental Company and Confirmation Number".

District – Individual traveling has made arrangements with Transportation Department to use a district vehicle.

Passenger Names: List individuals that will be traveling in the vehicle

Projected Amount: Amount that will be used for the requested travel

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

AIRLINE CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Contact Phone #: Contact phone of airline

Birth Date of Traveler: Automatically populated by employee record if not enter date of birth of traveler

Gender of Traveler: Automatically populated by employee record if not enter gender of traveler

Departure- Preferred Airline/Date/Time/Flight Number/Confirmation:

Projected Amount: Enter cost of flight travel

General Ledger Account Number : Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

<u>MEALS</u> CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Number of "Individuals": Enter the number of individuals traveling on this travel

<div style="background-color:#fdf5d4; text-align:center;">

*Clicking **Continue** takes you to the "Meal Expense" screen*

</div>

The system will prompt you to check:

District Paid: Check this box if the district will be reimbursing the amount of meals. AGENDA MUST BE ATTACHED.

Provided: Check this box if the meals will be provided during the travel

Meals Expense

Advance Required: ★ ⦾ Yes ⦿ No

Expense For: ★ Employee ▾   Payment Type: ★ Reimbursement ▾

Number of Employees: ★ 1

Date	Day of Week	Meal	District Paid	Provided	Per Diem	Projected
06-13-2021	Sunday	Breakfast			0.00	
		Lunch	✔	☐	12.00	12.00
		Dinner	☐	✔	0.00	0.00
06-14-2021	Monday	Breakfast	✔	☐	9.00	9.00
		Lunch	✔	☐	12.00	12.00
		Dinner	✔	☐	15.00	15.00
06-15-2021	Tuesday	Breakfast	✔	☐	9.00	9.00
		Lunch	✔	☐	12.00	12.00
		Dinner	☐	✔	0.00	0.00
06-16-2021	Wednesday	Breakfast	✔	☐	9.00	9.00
		Lunch	✔	☐	12.00	12.00
		Dinner			0.00	

Totals: Max Reimbursement 90.00

OTHER EXPENSES CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:
> Employee – individual traveling is a district employee
> Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)
> Student/employee – Individuals traveling are student and district employee
> Student – Individual traveling is district student

Payment Type:
> *Reimbursement – Cost will be reimbursed to the individual traveling*

Expense Name: Use Drop down to select expense

Projected Amount: Enter cost of expense

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

Submit/ Summary

This gives you a summary of all of the expense types you entered.

≡ Summary														5 Records
	Expense Type	Expense Description	Payment Type	Expense For	Proj Amt	Actl Amt	Account Number	Traveler	Vendor	Check Number	Check Date	Needed By	A	N
+	Event Registration	TASA Conference	Reimbursement	Employee	125.00		199.▮.6411.000.004.▮.000000	Franklin Moses					A	
+	Lodging	Omni Austin Hotel Downtown	Reimbursement	Employee	300.00		199.▮.6411.000.004.▮.000000	Franklin Moses						
+	Vehicle	Personal	Reimbursement	Employee	199.36		199.▮.6411.000.004.▮.000000	Franklin Moses						
+	Meals		Reimbursement	Employee	66.00		199.▮.6411.000.004.▮1.000000	Franklin Moses					A	
+	Other	Parking - Hotel	Reimbursement	Employee	25.00		199.▮.6411.000.004.▮.000000	Franklin Moses						

Projected Total: 715.36
Actual Total: 0.00

≡ General Section Attachments										1 Record
	Request ID	Event	City	Status	Next in Workflow	State	Departure Date	Return Date	Reimbursement Expected	Traveler	A
+	75	TASA Conference	AUSTIN	Entered		TX	11-15-2021	11-17-2021	N	Franklin Moses (▮)	

🔲 Submit

Once everything is filled out, click **SUBMIT**

🔲 Submit

> *THE TRAVEL REQUEST IS READY FOR WORKFLOW APPROVAL*