Pasadena Unified School District
CONFERENCE/OFF SITE EVENTS PROCEDURES

School Site/Department:

➢ Originates the **Green** "Request and Authorization of Conference Attendance" form at least three weeks prior to conference.

➢ Originator sends the Green Sheet and attachments for approval to the appropriate Assistant Superintendent (AS).

➢ Once approved, the AS sends the Green Sheet and attachments to the Categorical Director, if required. If not required, then AS sends the signed Green Sheet and attachments to the appropriate Chief for approval.

➢ Once approved by Chief, he/she sends the Green Sheet and attachments to Budget for verification of budget and to receive a "CT" Number (Conference Travel). Budget provides the originator a scanned copy of the Green Sheet with the CT number.

➢ Once the originator has the "CT" Number, an on-line requisition can be entered for the conference registration fees, transportation and lodging.

➢ Budget sends the entire packet to Procurement.

REQUISITION:

➢ The following information that **MUST** be included on each requisition:
- o "*Who*" is attending the conference
- o "*What*" is the name of the conference
- o "*When*" the conference will take place (date/s)
- o "*Where*" is the conference being held (include the address of the conference)
- o "*Cost*" of the conference (per attendee)

Any special instructions (such as pick up, Pre-Pay, deadlines) should be typed on the requisition. You must ensure that the method of payment selected is either via purchase order (P.O) or Pre-Pay. The only reason for a Pre-Pay request shall be in the case that the vendor **DOES NOT** accept P.O.'s. This will require the originator to closely examine the method of payment section for that specific purpose. Attach invoice/quote if available. Completes conference registration forms, if any.
- o For employee reimbursement see Accounting (Section 4) for "Reimbursable Conference Expense Report" procedures.
- o A "reimbursement" of over $150 requires a requisition (reference the CT# or Board Report number).

Purchasing Department:

➢ Creates Purchase Order and mails or faxes (only if fax number to vendor is included on the requisition) the original to the vendor.

➢ If you require special processing, you **must** state it on the requisition (i.e., please call___ when check is ready for pick-up [only in the case of authorized pre-pay] or please fax P.O. to xxx-xxxx).

➢ Buyer will mail the Purchase Order and the necessary registration documents (depending on timelines, this may take place via a fax).

➢ Sends attachments with accounting copy of Purchase Order to Accounting for processing payment.

Accounting Department:

➢ Receives the Purchase Order with all attachments.

➢ Processes payment to vendor when invoice is received.

REV 2019.02.08EX

Pasadena Unified School District
REQUEST AND AUTHORIZATION OF CONFERENCE/OFF SITE EVENTS ATTENDANCE
(Submit to appropriate Budget member __at least__ three weeks prior to conference)
GREEN SHEET

NAME OF ATTENDEE (S): _____ **DATE:** _____

List additional names on back of this Green Sheet.

POSITION (S):_____

CONFERENCE INFORMATION:
(___) Conference   (___) Amend Original Conference Request – Approved CT Number: _____

Conference Name: _____

Sponsored By:_____

Location :_____ Date(s) From _____ To _____

COST ESTIMATE (In order to be reimbursed, __all__ expenditures must be listed below):

TRANSPORTATION   (____)Air   (____)Rail   (____)Bus   (____) Privately Owned Vehicle

Mileage is only reimbursed if you actually drive your vehicle to the conference $ _____

Ground Transportation parking $ _____

MEALS *(TAX AND GRATUITY WILL __NOT BE REIMBURSED__ – SEE BP 3350)*

CSEA/TEAMSTERS - $ 40 per day $ _____
APSA/UTP - $ 50 per day $ _____

If the conference cost includes meal provisions for the you, you cannot claim meal reimbursement for that meal.
A copy of the conference registration must be attached to the request showing whether or not meals were included in the conference.

Authorization for Pre-Pay is granted ONLY if vendor does NOT accept P.O.

LODGING
(___) PO   (___) Pre Pay   (___) Reimbursement   (____) Requisition # _____ $ _____

REGISTRATION
(___) PO   (___) Pre Pay   (___) Reimbursement   (____) Requisition # _____ $ _____

TOTAL: $ _____

ACCOUNT(S) to be charged:

Fund/Resource/Goal/Function/Object/Location _____

Fund/Resource/Goal/Function/Object/Location _____

School/Dept.:_____ Approved By:_____ Title:_____

FINAL APPROVAL:

_____   _____   _____
Budget   Department Chief   Chief Business Officer

  Date _____   Date _____   Date _____

REVISED 2019.02.08 ex