



PORTLAND PUBLIC SCHOOLS

501 N. Dixon Street • Portland, OR 97227 Mailing
Address: P.O. Box 3107 • Portland, OR 97208-3107
Telephone: (503) 916-3378
E-Mail: traveldeskt@pps.net

ACCOUNTS PAYABLE – TRAVEL DESK

GUIDELINES FOR USE OF CAREER DEVELOPMENT FUNDS BY PFSP UNIT MEMBERS OTHER THAN OTPT, COTA, & LPTA

PFSP GENERAL RULES

Per Article 14 of the PFSP Contract, the District has established a fund for PFSP Unit Members to use for the purpose of upgrading and gaining new skills.

- \$750 available per Unit Member each contract year
- Total fund amount not to exceed \$43,000 per contract year
- Fund will be distributed:
 - \$21,500 1st half of the year-July through December
 - \$21,500 2nd half of the year-January through June
- Can be used for workshops, seminars, college tuition, and testing fees.
- **Cannot** be used for books, supplies or materials
- Unit Member must pay the tuition/fees up front and are reimbursed after completion of the class.
- Funds will be authorized and reserved based on the budgeted amount available when the Pre-Travel/Training Authorization form is received by the Accounts Payable-Travel Desk

The process for accessing career development funds is as follows:

1. Complete and submit a Pre-Travel Training Authorization form along with a copy of your registration and a brief description of the professional development activity prior to attending. The Pre-Travel Training Authorization form can be found on the PPS website at <http://www.pps.net/Page/2917>
2. Submitting the Pre-Travel Training Authorization will hold your approved funds until you complete the class.
3. You will receive an email notification of approval from the Accounts Payable-Travel Desk.
4. Once approved, attend the workshop, seminar or college class.
5. Upon completion of the workshop, seminar or class:
 - Submit an Employee Business Expense Reimbursement Request. The Employee Business Expense Reimbursement Request form can be found on the PPS website at <https://www.pps.net/Page/2924>
 - Attach the following documents
 - ✓ Certificate of attendance.
 - ✓ Receipt of payment
 - ✓ Note on the Expense Reimbursement form using "PFSP Funds."
 - ✓ Manager Approval signature.
6. After paperwork arrives and is processed at the Accounts Payable-Travel Desk a reimbursement will be mailed or deposited to the home address or bank account on record with Human Resources.
*Employees can update their personal information by accessing Self Service in PeopleSoft HRMS.

Note: Funds reserved but not used in a timely manner may be returned to the pool. Please make sure to submit your expense reimbursement request as soon as possible upon completion of your class, workshop or seminar.

Frequently asked PFSP questions:

1. How should I submit my travel and training authorization or employee business expense reimbursement request?

Please email them to the Accounts Payable-Travel Desk. Paperwork will be returned unprocessed if submitted without proper approval.

2. How do I find out how much Career Development Funds I have available?

Please email the Accounts Payable-Travel Desk at traveldesk@pps.net. You should keep track of your expenses.

3. Can I get reimbursed without submitting a travel and training authorization and receiving approval beforehand?

No. The purpose of the travel and training authorization is not only to obtain approval to attend your training, but to book your PFSP funds. Funds must be reserved prior to attendance to ensure reservation of your funds.

4. I've used all my PFSP funds this year and have attended additional coursework. Can I submit a reimbursement request next year for this year's classes?

No. Expenses cannot cross fiscal years. They must be applied to the fiscal year in which they took place.

5. Can I use my PFSP funds for training that includes digital/technological devices?

You may use your PFSP funds to cover registration costs. However, if there is a separate cost for said device, you must buy that on your own.

6. Can I submit my reimbursement request before I receive my grades?

No. In order to receive your reimbursement, you must have proof of attendance/grades. Grades must be "Pass" or "A", "B", or "C".

7. What if I didn't get a certificate of attendance from my training/conference?

Due diligence must be done to try and secure a receipt. Instructors can provide an email for proof of attendance or proof of completion as a substitute of grade. Expenses with no receipt will not be reimbursed.

8. What qualifies as proof of payment?

A paid receipt, or zero balance invoice indicating method of payment are acceptable examples. For completed coursework, a statement from your college showing payment can also be submitted.

9. May I scan or email my requests?

Yes, we are paperless and only accept scanned .pdf files for processing. Budget holder must sign the paperwork and also be cc'd on the emailed request.