PORTLAND PUBLIC SCHOOLS

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ACCOUNTS PAYABLE – TRAVEL DESK

GUIDELINES FOR USE OF PROFESSIONAL IMPROVEMENT FUNDS
BY PAT UNIT MEMBERS

PAT GENERAL RULES

Members of the PAT unit are allotted $2,200 to use over a 3-year period. Currently, the 3-year period begins the school year a unit member initiates an approved Professional Improvement activity. The PIF cycle is August 1-July 31. Funds may be used for registration costs for conferences, workshops, seminars, site visitations, and for travel costs if the activity is outside a 25-mile radius of Portland.

PLEASE NOTE: Professional Growth is still being managed by Human Resources. Any reimbursement requests involving credits or PRAXIS, HOUSSE or ORELA exams must still be sent to HR. If you are in doubt, please contact Human Resources at hrprofessionalgrowth@pps.net for clarification.

How to Apply for PIF

Pre-Trip

Complete a Pre-Travel/Training Authorization form with estimated costs and *appropriate* signatures. The completed form should be submitted 4-6 weeks before the conference/workshop. The Authorization form can be found on the PPS Inside website under http://www.pps.net/Page/2917. You will not be reimbursed without pre-approval of a completed Pre-Travel/Training Authorization form.

- Attach a brochure describing the conference/workshop.

- If you are requesting the District to prepay your registration fee, please check the 'yes' box on the Authorization form and attach ***a completed registration form*** that includes who to make payment to and a remit address. **NOTE**: Travel Desk pre-payment is done by check or credit card.
  Meal per diem is allowed for conferences with overnight travel only. This information can be found at: http://www.pps.net/Page/2917.
  Day of Travel per diem will be prorated per IRS regulations. Meals provided as part of the registration fee will be subtracted from the daily meal per diem.

- If you need to book airfare and/or lodging you may either:

  - Call CTM (Corporate Travel Management) at 1-877-564-1095 and speak with an agent. Identify yourself as a PPS employee. They can assist you with setting up a profile and booking your flight.
  - Visit the CTM website at https://gateway.us.travelctm.com/pps and book your own flight and lodging. If you do not already have a sign on, you will need to click on the register a profile button and fill in the required information. You will receive an email with your login and temporary password.

- After you select your flight, the request will be forwarded to the Travel Desk who will approve your purchase based on your Pre-Travel form. The Travel Desk will have 24 hours to approve. Once approved you will receive an email with your ticket information.

- Airfare will be charged to the PPS account, you do not need a credit card. If you book lodging you will need to use a PPS PCard or a personal credit card.

NOTE: While CTM is available to assist you 24/7 please do not book flights after 3:00 pm on Fridays, all day Saturday or Sunday before noon. No one will be in the PPS office to approve and you will lose your reservation.

- Rental cars can be booked with CTM but are paid for when turning in your vehicle. You will need a PPS PCard or personal credit card. Rental cars require prior authorization in order to use a PPS PCard or to be reimbursed.

NOTE: When using a personal credit card, reimbursement is made after trip is completed and a Travel Training Reimbursement form is submitted to the Travel Desk, with proof of completion.

- Travel Advances, may be requested in advance (limited to $100) for travel expenses not pre-paid by the District, like, baggage, or shuttles, and are direct deposited or mailed to the address on record with HR. Employees can update their address by accessing Self Service in PeopleSoft.

- Travel Advances will not be issued for Registration, airfare, lodging, mileage or per diem. No subsequent advance will be issued to an employee with an outstanding, unreconciled and/or past due balance from a previous completed travel advance unless approved in writing by the Sr. Manager, Accounts Payable.

  - The completed Pre-Travel/Training Authorization form and supporting documents should be sent to the Accounts Payable - Travel Desk (Traveldesk@pps.net).

Post-Trip

- The **Travel/Training Expense Reimbursement Request** must be submitted to the Accounts Payable-Travel Desk within **30 days** after your return. You can find this form on the PPS Inside website under http://www.pps.net/Page/2917.

- Attach the following documents to your Reimbursement Request:
  - Proof of Completion - Certificate of attendance, name badge, or email acknowledgeement from training institute of attendance.
  - Receipts such as registration fees and travel expenses. Receipts are not required for meals. Receipts must show method of payment.

If you have additional questions please contact the Travel Desk by emailing **traveldesk@pps.net** or visit the Accounts Payable Department website, Travel Resources http://www.pps.net/Page/2917.

Frequently asked PAT questions:

1. **Do I need pre-approval?**

   Yes! You must complete a Pre-Travel/Training Authorization prior to any travel/training event.

2. **How do I find out how much Professional Improvement Funds I have available?**

   Please email the Accounts Payable-Travel Desk at traveldesk@pps.net, and provide name and employee ID. You should keep track of your expenses.

3. **If I find a cheaper airfare rate elsewhere, can I pay it myself and get reimbursed?**

   Yes, however reimbursement for airfare purchased on your own is done only after the trip has taken place.

4. **How soon can I book my flight?**

   As soon as you receive the approval email from the Travel Desk. However, while CTM is available to assist you 24/7 please do not book flights after 3:00 pm on Fridays, all day Saturday or Sunday or holidays before noon. No one will be in the PPS office to approve and you will lose your reservation.

5. **What if my trip comes up unexpectedly?**

   Submit your paperwork as soon as possible and the Accounts Payable-Travel Desk will do the best they can to insure your travel is processed in time for you to go.

6. **How much money can I have advanced?**

   You may request up to $100, (within your available funds and based on the expenses included in your Pre-Travel/Training Authorization) advanced to you except for what the District has prepaid for you.
   A travel advance will not be issued for registration, airfare, lodging, per diem or mileage.

7. **What is the Per Diem rate?**

   Meal per diem is allowed for travel requiring an overnight stay only. The rate is now based on Federal guidelines. This information can be found at: http://www.pps.net/Page/2917
   Day of Travel per diem will be prorated per IRS regulations. Meals provided as part of the registration fee will be subtracted from the daily meal per diem.

7. **What is the mileage rate?**

   The rate is based on the IRS mileage rate. The current mileage can be found at:
   http://www.pps.net/Page/2914

8. **How should I submit my travel and training authorization or expense report?**

   Please email requests to Accounts Payable-Travel Desk. Paperwork will be returned unprocessed if submitted incomplete - without proper approval, missing documentation, or form not fully completed**.**

9. **If materials are purchased through a conference/seminar, who has ownership?**

   The District has ownership of the materials. Any materials purchased in this manner should be relinquished to the District if you are no longer employed by PPS. This includes iPads obtained as part of a class.

11. **What should I submit with my Travel/Training Expense Reimbursement Request?**
    Be sure to submit proof of payment and proof of attendance with your reimbursement request for processing. Submit all receipts associated with your travel, except for any meal and mileage receipts. Proof of attendance could be a certificate or name badge. Please call the Accounts Payable-Travel Desk with any questions.

12. **What if I have lost a receipt or was never given one?**
    Due diligence must be done to try and secure a receipt. Vendors such as Hotels are often able to re-create an invoice for you. Expenses with no receipt will not be reimbursed.

13. **What qualifies as proof of payment?**
    A paid receipt, that is itemized and shows payment information (last 4-digits of credit card), front & back of check. For completed coursework, a statement from your college showing payment can also be submitted.

14. **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.