



# 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 \$1,500 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](mailto: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://inside.pps.k12.or.us/files/forms-processes/1.pdf>. (You must have the Adobe Reader program to access and retrieve this form).

- 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 invoice only. On-line registrations requiring payment by **credit card** can NOT be processed by the Accounts Payable-Travel Desk.
- Per diem for meals is allowed for conferences with overnight travel only. This information can be found at <http://www.pps.k12.or.us/departments/accounting/4595.htm>. Day of travel per diem may be prorated per IRS regulations.
- If flying, you can call Azumano Travel at 1-866-291-0460 for an estimate. Once your Pre-Travel/Training Authorization form is processed, the Accounts Payable-Travel Desk will e-mail your confirmation number so that you can book your flight.
- Travel Advances, may be requested in advance for lodging, registration fees and other travel expenses not pre-paid by the District and are 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 per diem and mileage only. 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 Accounts Payable Manager.
- The completed Pre-Travel/Training Authorization form and supporting documents should be sent to the Accounts payable-Travel Desk. Please submit original requests only. No faxes allowed. Paperwork will be returned unprocessed if submitted without original signatures.

### **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://inside.pps.k12.or.us/files/forms-processes/9\\_b.pdf](http://inside.pps.k12.or.us/files/forms-processes/9_b.pdf) (You must have the Adobe Reader program to access and retrieve this form.)
  - An original Travel/Training Expense Reimbursement Request, original signatures, and original paid receipts are required for reimbursement of expenses-no copies/faxes accepted!
- Attach the following documents to your Reimbursement Request:
  - Certificate of attendance.
  - Original receipts such as registration fees and travel expenses. Receipts are not required for meals. Receipts must show method of payment and no balance due.

If you have additional questions please contact the Accounts Payable-Travel Desk at 503-916-3378 or email [traveldeskt@pps.net](mailto:traveldeskt@pps.net)

## 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 contact the Accounts Payable-Travel Desk at 503-916-3378 or by email at [traveldeskt@pps.net](mailto:traveldeskt@pps.net). 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 you *MUST* get a signed release from Azumano prior to booking your flight in order to buy tickets elsewhere. You WILL NOT be reimbursed for airfare you purchase on your own without prior approval from Azumano. The Azumano Travel Release form is available online at [inside.pps.k12.or.us](http://inside.pps.k12.or.us) under forms > district business forms or at <http://www.azumano.com/oregon/contractRel.html>. When filling out the form PLEASE follow all of the instructions carefully! Reimbursement for airfare not purchased through Azumano is done only after the trip has taken place.

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

You will receive an email from the Accounts Payable-Travel Desk with your authorization number. You can then call Azumano Travel at 1-866-291-0460 to make your travel arrangements. Inform them that you are with PPS; give them your name and your authorization number.

### 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?

Depends, you may request to have any amount (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 per diem and mileage only.

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

*Per Diem* (meals) are only allowed for travel requiring an overnight stay. The rate is now based on Federal guidelines. This information can be found at <http://www.pps.k12.or.us/departments/accounting/4595.htm>. Day of travel per diem may be prorated per IRS regulations.

### 8. What is the mileage rate?

The rate is based on the IRS mileage rate. The current mileage rate is 56 cents per mile as of 1/1/2014 and is subject to change.

### 9. How should I submit my travel and training authorization or expense report?

Please PONY, mail or hand-deliver them to Accounts Payable-Travel Desk. Original documents only please, no faxes or copies will be processed. Paperwork will be returned unprocessed if submitted without original signatures.

**11. 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.

**12. 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.

**13. 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. If you have lost a receipt or never obtained one and cannot secure a replacement do the following:

- Purchase of \$25.00 or less - Document in a brief explanation on your expense reimbursement request.
- Purchase greater than \$25.00 - You must complete the Missing Receipt Declaration found on the Inside PPS website under District Business Forms <http://inside.pps.k12.or.us/forms-processes/143.htm>

**14. What qualifies as proof of payment?**

A bank/credit card statement, paid receipt, or zero balance invoice are acceptable examples. For completed coursework, a statement from your college showing payment can also be submitted.

**15. Will the process of approval or reimbursement be quicker if I fax my requests?**

No, since we do not accept faxes, it will not go any more quickly.