



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Employee
Advance/Reimbursement

REVISED DATE:10/18/2022

SUBJECT: Employee Reimbursement

Entry Point: Create Employee Advance/ Reimbursement Request

Maintain Employee Advance/Reimbursement Request

Selected Position: 7042 Role Name: Specialist - Business and Finance (Support)

Employee Advance/Reimbursement Request Details

Fiscal Year: * 2022

Request Type: *

Payment Type: * Paper Check

Reference: *

Justification: * Characters remaining: 255 (255 max)

Recipient: * Recipient:

Supporting Documentation: *

Route Check: *

Need Separate Check?:

Needed By: *

Event Date: *

DISTRICT WILL NOT ISSUE EMPLOYEE ADVANCEMENTS

Fiscal Year:

Year is auto populated, or use the drop down to select the year.

Recipient:

Enter name or ID number, or use the icon to lookup the employee being reimbursed.

Request Type:

Use drop down menu, select request type.

Supporting Documentation:

Attached

(You will not be able to submit the request until you attach a file)

Payment Type:

Direct Deposit

Route Check:

Electronic

Reference:

Enter invoice number, store name with the date/year, or mileage month

(Reference number will turn in to the invoice number once submitted)

Need Separate Check?:

Do not check this box

Justification:

Enter purpose of request

Needed By:

Enter date, check printing ONLY occurs on Wednesdays (allow two weeks for processing)

Event Date:

Enter date of Event, or invoice date



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Amount:
Enter information

Description:
Enter item description using this format: Vendor name/ reason for the purchase

Accounts:
Click on window icon to bring up the account pop up – enter account number
(To split accounts: scroll the Grey bar to the right, click on the plus icon)
Enter account number
Click Okay

Add multiple invoices to a reimbursement:
Click on the plus icon – this will bring up another line

Drop or Upload supporting documentation:
Click Upload button
Or
Drop files
Use the drop down to select the Type of attachment

ATTACH EACH INVOICE/ DOCUMENT SEPARATELY

Click Submit