



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Non-Employee
Advance/Reimbursement

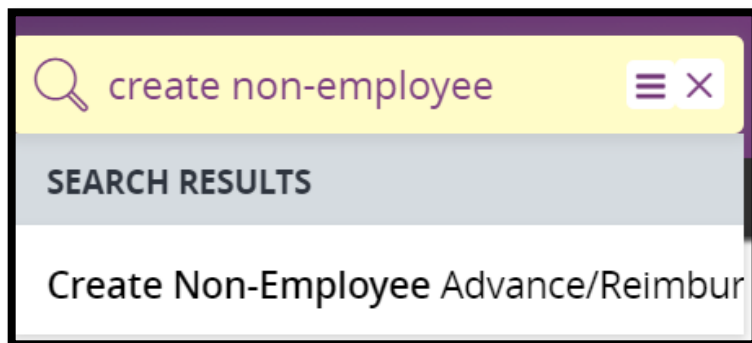
DATE DEVELOPED: 07/15/2021

REVISED DATE:

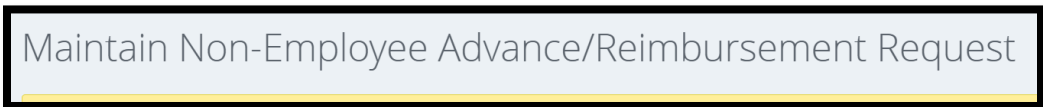
SUBJECT: Non- Employee Reimbursement

Create Non-Employee Reimbursement

- Enter **Create Non-Employee Advance/Reimbursement** in the Search field. Located upper right corner on the Purple ribbon.



This pulls up the screen **Maintain Non- Employee Advance/Reimbursement Request**

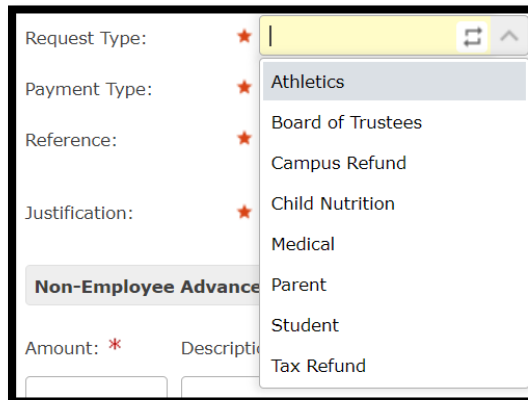


Recipient

- Use icon to search, or type in individuals name



Request Type





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Supporting Documentation

- Using the drop-down menu, select attached

v

Supporting Documentation: ★ Attached ▼

YOU WILL NOT BE ABLE TO SUBMIT THE REQUEST UNTIL YOU ATTACH A FILE

Payment Type

- Defaults, Paper Check
 - Non-Employee are always paid using a paper check

Route check

- Select from the drop-down menu
 - Hold for Pickup – requester will need to pick up in the Accounting Department
 - Return to Requestor – will mail to payee via USPS
 - Mail to Recipient - will mail to payee via USPS

Reference

- Enter invoice number, receipt number, or enter date

Reference: ★ 135686

THE REFERENCE NUMBER WILL TURN IN TO THE INVOICE NUMBER ONCE SUBMITTED

Need Separate Check?

- This box will always be checked, yes

Need Separate Check?:

Justification

- Enter purpose of request
 - Add any additional details pertaining purchases, and or reimbursements

Justification: ★ Characters remaining: 248 (255 max)



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Non-Employee Advance/Reimbursement Request Line Items

Amount, Description

- Enter reimbursement amount and the reason/ purpose for the reimbursement

Non-Employee Advance/Reimbursement Request Line Items

Amount: * Description: * Accounts: *

Total Amount: \$0

General Ledger Account Number

- Click on the icon to start entering General Ledger Account Code
 - You can split the account codes for one invoice

Accounts: *

199.41.6399.000.730.99.000000 - 40.0

199.41.6499.000.730.99.000000 - 60.0

Attachments

- Scan, or Drag to attach supporting documentation

Route Attachments

Upload

Drop files here

or use the Upload button to attach, up to 10 MB per file.

File Name Delete

SUBMIT

Once completed, click **Submit** button





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ADDING NEW NON-EMPLOYEE

NON-EMPLOYEE INDIVIDUALS ARE CLASSIFIED AS BOARD OF TRUSTEES, SUBSTITUTE TEACHERS, STUDENTS AND/OR PARENT REQUESTING REFUNDS. NON-EMPLOYEES ARE INDIVIDUALS THAT HAVE NOT PERFORMED A SERVICE TO THE DISTRICT.

CLICK ON HYPERLINK

<https://forms.gle/43Mty1rXVrkGvVP29>

MUST BE LOGGED INTO THE DISTRICT GOOGLE ACCOUNT TO ACCESS FORM.

Reimbursement

All Fields are REQUIRED. Complete this form to request to add a Non-Employee into Frontline.

* Required

CAMPUS NAME: *

Your answer _____

DATE: *

MM DD YYYY

__ / __ / __

REQUESTOR NAME: *

Your answer _____

REQUESTOR PHONE EXT: *

Your answer _____



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COMPLETE FORM

- **ENTER** information on fields
 - **Campus Name** – Enter the name of campus requesting new Non-Employee
 - **Date** – Enter the date that new Non-Employee is being requested
 - **Requestor Name** – Enter the name of requestor
 - **Requestor Phone Ext.** – Enter the requestor extension

CLICK – Next button



CONTINUE ENTERING FORM BY COMPLETING THE PAYEE INFORMATION

ENTER PAYEE INFORMATION BELOW

PAYEE NAME (FIRST AND LAST NAME) *
 Your answer _____

PAYEE ADDRESS (STREET, APT #, CITY, STATE, AND ZIP CODE): *
 Your answer _____

PAYEE EMAIL ADDRESS: *
 Your answer _____

PAYEE PHONE NUMBER: *
 Your answer _____

REASON FOR REIMBURSEMENT: *
 Your answer _____



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- **ENTER** information on fields
 - **Payee Name** – Enter individual name that will need the reimbursement
 - **Payee Address** – Enter individual address where the check will be mailed
 - **Payee Email Address** – Enter email address
 - **Payee Phone Number** – Enter Phone number

ALL FIELDS MUST BE COMPLETED BEFORE SUBMITTING FORM

CLICK – SUBMIT button

A red rectangular button with a black border and the word 'Submit' in white text.

Submit

ONCE FORM IS SUBMITTED IT WILL BE FORWARDED TO DIRECTOR OF ACCOUNTING
AND LEAD ACCOUNTS PAYABLE SPECIALIST TO PROCESS. WILL TAKE 24 TO 48
HOURS TO PROCESS.