



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Employee
Advance/Reimbursement

REVISED DATE:05/01/2023

SUBJECT: Toll Charge Reimbursement

Entry Point: **Create Employee Advance/ Reimbursement Request**

Employee Advance/Reimbursement Request Details				
Fiscal Year: *	2023	Recipient: *	<input type="text"/>	Recipient:
Request Type: *	<input type="text"/>	Supporting Documentation: *	<input type="text"/>	
Payment Type: *	Direct Deposit	Route Check: *	<input type="text"/>	
Reference: *	<input type="text"/>	Need Separate Check?:	<input type="checkbox"/>	
Justification: *	<input type="text"/>	Needed By: *	<input type="text"/>	<input type="text"/>
	Characters remaining: 255 (255 max)	Event Date: *	<input type="text"/>	<input type="text"/>

DISTRICT WILL NOT ISSUE EMPLOYEE ADVANCEMENTS

Fiscal Year

Year will populate automatically

Recipient

Enter the employees name or ID number, you can also use the icon to lookup the employee being reimbursed

Request Type

Use the drop-down list to select, **Toll Road Charges**

Supporting Documentation

Use the drop down to select, **Attached**

You will not be able to submit the request without an attachment

Payment Type

Direct Deposit will populate automatically

Route Check

Use the drop down to select, **Electronic**



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Employee
Advance/Reimbursement

REVISED DATE:05/01/2023

SUBJECT: Toll Charge Reimbursement

Reference

Enter the statement month along with the year

Ex: Sept-Oct 2022 Tolls – for multiple months

Nov 2022 Tolls – for one month

Need Separate Check?

Select **Need Separate Check** to issue this reimbursement as a separate check. Otherwise, this reimbursement will be included with others (if any) in a single check.

Justification

Use this field to explain the reason for the reimbursement in more detail, so your approvers know the purpose of the employee reimbursement.

Needed By

Select the Need By date, check printing ONLY occurs on Wednesdays

Allow **two weeks** for processing

Event Date

Select the date when the toll was charged. If submitting a month’s worth of charges, select the first date charged.

Amount

Enter the amount of the toll charge

Description

Use this format: Month of charge “Toll Charge” Year

Amount: *	Description: *
1.75	Sept Toll Charge 2022



FRONTLINE PROCEDURES


Pasadena ISD

ENTRY POINT:
Create Employee
Advance/Reimbursement

REVISED DATE:05/01/2023

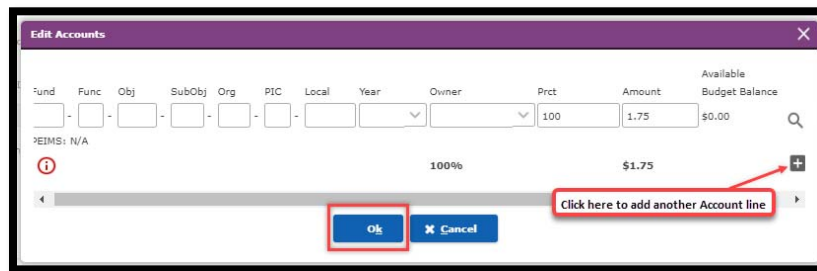
SUBJECT: Toll Charge Reimbursement

Accounts

Click on window  icon to bring up the account pop up

The account can be supplied by **Secretary** or **Bookkeeper**, or click the search icon to show a list of accounts. The object code for toll charges should be 6411

If splitting accounts scroll the grey bar to the right, click on the plus icon



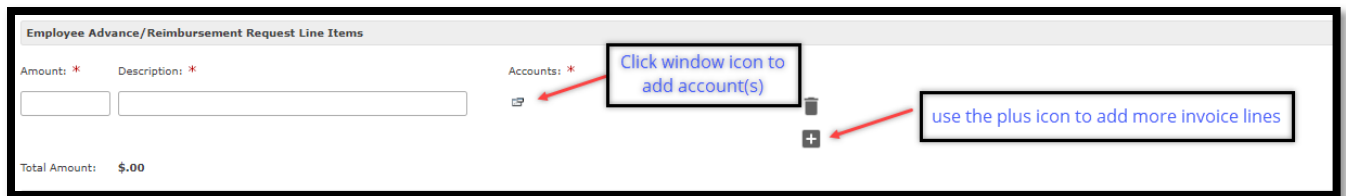
Enter account number

Click **Okay**

Adding more than one month of toll charges to a reimbursement

Click on the plus icon

This will bring up another line to enter additional toll charges





FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Employee
Advance/Reimbursement

REVISED DATE:05/01/2023

SUBJECT: Toll Charge Reimbursement

Attachments

Upload the toll receipts/statement (*highlight the date/time of the toll charge*)

ATTACH EACH MONTH'S TOLL RECEIPT/STATEMENT SEPARATELY

Click **Upload** button

Or

Drop files

Use the drop down to select the Type of attachment, select, **Receipt**

File Name	Type	Delete
Invoice JAN 2023.pdf	Confirmation Driver's License/Social Security Invoice Other Packing Slip Quote RFP/Bid Receipt	

Submit Clear Cancel

Click **Submit** when finished.