

I would like to attend a conference or other Professional Development. What do I do??

Step 1. Submit agenda/flyer and an itemized list of your estimated travel expenses to your Supervisor for approval, either via email or in person. This should include estimated hotel, flights, registration, meals, etc. and present the total estimate to Supervisor for pre-approval.

Note to Supervisors: Before approving PD, ensure that requested PD is in alignment with your school's 90 Day Plan and that the employee requesting PD is up to date on all licensure requirements.

Step 2. If the supervisor pre-approves the PD, the supervisor contacts Sheila Stevenson (DFO) (or Taryn Fogle for SPED) via email or phone for prior approval and funding code. If funding is available, Sheila and/or Taryn will approve and determine which account code should be used. Superintendent and Innovation Team may be consulted to make this decision and to confirm alignment with 90-Day Plan and verify staff licensure.

Step 3. After receiving funding code from Sheila/Taryn, supervisor signs agenda or “save the date” flyer and returns documents to employee or replies via email that the PD has been approved and provides the fund code from Sheila/Taryn to the employee.

Step 4. Employee should then contact school site secretary for help to complete Travel Estimate form (red form) or may download the form from the Business Services page on the HVPS website and may complete the form on their own.

- Whether the employee or the secretary completes the form, it must be

DOWNLOADED AND OPENED IN EXCEL. DO NOT USE GOOGLE SHEETS.

(See Travel Estimate Directions/Daily Travel Estimate Directions documents.)

- Required information to complete estimate forms: estimated leave date/time and return time/date, location and name of conference, names of employee(s) traveling, vehicle request, etc. This form calculates an estimated reimbursement in order for your secretary to create the PO for meal reimbursement to the Employee.
- Complete the Daily estimate form if you are not spending the night, (even if traveling to the same location two days in a row)
- Complete the Overnight estimate form if you are traveling and staying overnight (again, the form can be found on the HVPS website under the Business Services tab)
- The employee must complete the Travel Agreement (annually).

Step 5. Secretary/employee then submits the estimate form, agreement form and agenda to the Supervisor for approval (may submit via Adobe sign or wet signature).

NOTE: *Do not register until you have received the PO back from the Business Office.*

Step 6. Secretary then creates PO(s) for Registration, Hotel, Employee meal reimbursement, flights, etc. Secretary / employee will ensure that all POs are in place before the employee is

registered for the conference if there is a registration fee or charges are incurred. Attach agenda/flyer signed by supervisor (or approval email), travel estimate and all other pertinent information to POs.

PO FORMAT

Each line on the PO should follow this pattern regardless of the fund:

- Name of Conf. Regis. Name of employee, location, dates
- Name of Conf. Meals/Parking Reim. Name of employee, location, dates
- Name of Conf. Flights. Name of employee, location, dates, Airline Company
- Name of Conf. Car Rental. Name of employee, location, dates, Rental Company
- Etc.

Step 7. Once PO(s) is/are received, the secretary will book hotel rooms/register employee/book flights, etc. and schedule a vehicle in TripDirect if required, using the SAME Fund code as the POs, etc. at least 7 days before the trip. (If the Fund code is not available in TripDirect, call Sheila Stevenson. Do not enter with an incorrect code.)

Step 8. Secretary then creates a Google Calendar Event and shares with Sheila Stevenson, Shelly Ortega, Raney Weiler and Jessica Batrez and ALL employees traveling.

- Upload all pertinent documentation to the event (hotel confirmations, Copies of staff meal reim. Pos, Regis. PO, Hotel PO, agenda, Regis. Confirmations, etc.
- The event Title should include: Name of Conf., Location, then in parenthesis:

(5 digit Fund, #Last 4 of Credit Card used for charges i.e., CC#1234, Trip ticket number i.e., TripID#1234 or TripID N/A)

Examples:

LitCon Columbus, OH (27114, CC#1878, Trip#1552)

FFA NM Leadership Conference, ABQ (11000, CC#2343, Trip#1501)

NMSBA Board Member Institute, Santa Fe (11000, CC#9272, Trip#1579)

Step 9. Employee picks up credit card from Jessica Batrez before traveling and keys for school vehicles from Transportation Dept. and must follow transportation and district travel policies. See Travel Agreement.