

FRONTLINE PROCEDURES

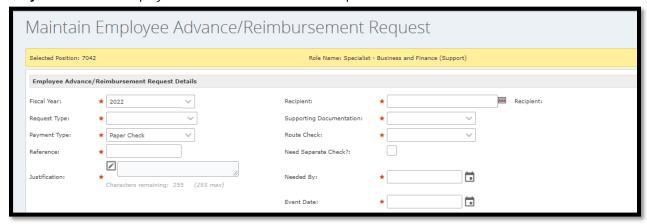
Pasadena ISD

ENTRY POINT: Create Employee Advance/Reimbursement

REVISED DATE:10/18/2022

SUBJECT: Employee Reimbursement

Entry Point: Create Employee Advance/ Reimbursement Request



DISTRICT WILL NOT ISSUE EMPLOYEE ADVANCEMENTS

Fiscal Year:

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

Reipient:

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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Pasadena ISD

ENTRY POINT: Create Employee

Advance/Reimbursement

REVISED DATE:10/18/2022

SUBJECT: Employee Reimbursement



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