

Purchase Requisitions, Reimbursements, and School Trips Policies

HCS Request System
Hapeville Charter Schools

Check Request – HCS Policy

- Page 56 of the HCS Employee Handbook.

Check Request

The HCS Business Office schedules checks to be written twice a month. Depending on holidays and weekends the Business Office will write checks on the 5th and 20th of each month.

Checks to be written on dates other than the designated dates (5th and 20th of each month) must be approved by the school President.

Before a check can be written and released the following must be received by the school Business Office via email, fax or through interoffice mail:

1. An Online Purchase Requisition completed and approved by the school Principal, President.
2. A completed Federal W-9 form for all vendors must be on file in the Business Office before a check is released. Please contact the Business Office and see if a W-9 is needed or not.
3. Invoice from the vendor that matches the Purchase Requisition and W-9.

Purchase Request Policy

- Page 68 of the Employee Handbook

Purchase Requisitions and Expense Reimbursements

Approved by the HCS Board of Directors March 2014

The process for an employee to request a purchase (or purchases) is as follows:

- 1) Complete the Online Purchase Requisition process.
 - a. Contact the Business Office for instructions for the Online Purchase Requisition Process.
 - b. Documentation such as Quotes, Order Forms, etc. must be attached with all Purchase Requisitions.
- 2) Submit the completed Purchase Requisition Process
- 3) The Purchase Requisition will go through the following steps
 - a. >Business Office to ensure funds are available for the purchase
 - b. >School Principal to approve purchase
 - c. >School President to approve Purchase
 - i. If approved >sent to the Business Office to be purchased
 - ii. If Not Approved >the requestor will be informed that the purchase requisition was not approved.

This process has been implemented in order to provide timely service to employees, and to ensure that (a) HCS has the time to research comparable pricing and (b) HCS, a "section 501(c)(3)" tax exempt corporation, is not invoiced with sales tax added. In addition, this process has been implemented to comply with the yearly financial audit requirements.

If you purchase item(s) with your personal funds (without the use of a Purchase Requisition), HCS will reimburse you for reasonable pre-approved expenses ONLY with the submittal of an online Purchase Requisition. Original receipts must be submitted with the online Purchase Requisition. Once the online Purchase Requisition for reimbursement is submitted it will follow the same process as above.

Reimbursement (Mileage) Request Policy

- Pages 18-25 and 68 for Mileage and Travel Reimbursements and 68 for non-travel reimbursements

Note: No reimbursement will be paid after thirty (30) days from the date of a purchase. Sales tax will not be reimbursed by HCS for any purchases made with your personal funds, personal credit cards, etc. All vendor sales receipts submitted must be itemized with the product description(s) for reimbursement. Non itemized receipts will not be approved for reimbursement.

Travel Reimbursement Policy

- Page 18-25 of the Employee Handbook

Employee Travel Policy

It is the intention of Georgia Magnet/Charter Schools Foundation, Corp. to reimburse employees for travel and related expenses incurred on behalf of the school and arising out of the individual's employment by the district. Normal daily commuting costs are not reimbursable.

School Trips

- Page 25 and 77 of the Employee Handbook

Field Trips / School Sponsored Trips

Approved by the HCS Board of Directors April 2014

All employees who want to sponsor a school trip for academics, athletics, and student activities will complete the Online School Trip Request Form. A link for online request form is found on the school intranet. Contact the School Trip Coordinator with any questions regarding the Online School Trip Request Form at SchoolTrips@hapevillecharter.org.

The Online School Trip Request Form must be completed to ensure a reasonable timeframe for but not limited to accurate money collection, booking of hotel and transportation accommodations, and the collection of parent/guardian permission forms.

Trip Sponsor

The employee who completes the online request form is the trip sponsor. The trip sponsor will determine the destination(s), date(s), and time(s) for any and all trips he or she want to sponsor. The trip sponsor will complete the online request form.

School Trip Coordinator

The School Trip Coordinator will review the request form to ensure all necessary information is provided, obtain transportation and meal costs, and provide a cost-per-student amount to the trip sponsor, bursar, school principal and school president.

Approval

Once all the information is entered into the request form, it will be sent to the school principal and president for approval. When the principal and president make their decision, a message will be sent to the trip sponsor, school trip coordinator, and bursar.

5. Coordinate any field trip planning with your Principal. Field trips should be planned as far in advance as possible to facilitate food service, budgeting and substitute teacher scheduling.

HCS Request System – Log Into SharePoint

Signing Into SharePoint

HCS uses Microsoft SharePoint through Office 365. HCS' IT department will provide access to all teachers to Office 365. After completing the access form, the Business Office will connect your Office 365 profile to SharePoint. The Business Office will email when you have access to SharePoint, and you are able to enter requests.

Resolution for Office 365/SharePoint Login Issues **(PLEASE READ)**

You will receive two Office 365 login credentials.

- The first is from Hapeville Charter Schools
 - Your credentials will have the **@hvcharter.org** domain to log in
- The second is from Fulton County Schools which also uses Office 365
 - Your credentials for FCS will have **@fultonschools.org** domain to log in.

| Office 365 Account Holder | Office 365 Domain |
|----------------------------------|-----------------------|
| Hapeville Charter Schools | @hvcharter.org |
| Fulton County Schools | @fultonschools.org |

There are two solutions for you to use both log in credentials

- You can use the same web browser, but you will have to ensure that you are logged into the correct domain when you trying to access Hapeville Charter (@hvcharter.org) and Fulton County Schools (@fultonschools.org).
 - This means you might have to log out completely from one domain before logging into the other.
- The other solution is to use two different web browsers. You should use your default web browser for the Office 365 domain you use most often, and use a second web browser when you need to log into the other Office 365 domain.
 - Example
 - If you primarily use Chrome as your web browser, you should use Chrome to log into the Office 365 domain you use more often
 - Then you should use a different web browser like Firefox, Microsoft Edge, or Safari (if you're on a mac) to log into the Office 365 domain you don't use as often

Sign into SharePoint

- Use this link: <https://hapevillecharterschools.sharepoint.com/sites/BusinessOfficeRequests>
- **Make sure you are signed in with your [name]@hvcharter.org log in and not your @fultonschools.org login**
- Input your username
 - Your username will be the same as the first part of your Hapeville Charter email.
 - Typically First Initial + Last Name.
 - Use the domain **@hvcharter.org** (NOT @hapevillecharter.org).
 - Example – John Doe will be **jd@hvcharter.org**
- Enter the initial password the Business Office sends you.
 - On your first login you will be required to change the password.

Accessing SharePoint

- Enter your **@hvcharter.org** username
 - Provided by the HCS Business Office
 - Click "Next"



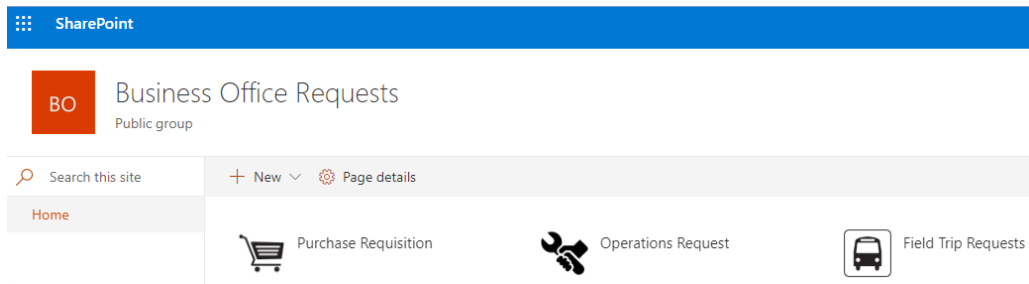
Microsoft
Sign in
youname@hvcharter.org
Can't access your account?
Back Next

- Enter your Temporary Password
 - Initial password provided by HCS Business Office
 - Click "Sign in"
 - If this is your first time signing in you will be required to change the password.



Microsoft
zwilliams@hvcharter.org
Enter password
.....
Forgot my password
Sign in

- When you successfully sign in you will see the "Business Office Request" main page



SharePoint

BO Business Office Requests
Public group

Search this site + New Page details

Home

Purchase Requisition Operations Request Field Trip Requests

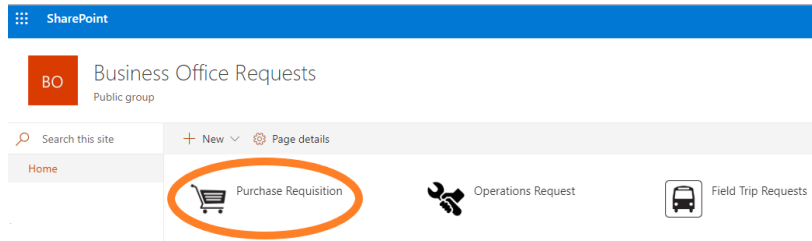
Before you start you will need

- The seller's information
- Documents to support the item descriptions and prices – typically a Quote or copy of an Online Shopping Cart

Step 1: Sign into the Request System

- <https://hapevillecharterschools.sharepoint.com/sites/BusinessOfficeRequests>
- Make sure you are signed in with your [name]@hvcharter.org log in and not your @fultonschools.org login

Step 2: Select the Purchase Requisition Option



Step 3: Select the purchase requisition category and shipping location

- **Category:** If you have questions regarding which category to choose contact Charlene Bussey at cbussey@hapevillecharter.org or extension 432
- **Shipping Location:** Choose the location the items need to be shipped. PRs for registration fees or software licenses choose "No Delivery Required"

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION
17-BUSN-2130

| Purchase requested by: | | | |
|------------------------|------------|-------|--------------------|
| Employee | Department | Role | Request Date |
| Christopher Worley | BUSN | Staff | September 24, 2019 |

| Select the purchase requisition category. | Shipping Location |
|--|---|
| <ul style="list-style-type: none"> Association/ Organization Fees Athletics - Middle School Athletics - Career Academy Athletics - General Conference/ Workshop Instructional Supplies Mileage Office Supplies Reimbursement Student Activity Technology - Middle School Technology - Career Academy Technology - General | <ul style="list-style-type: none"> Business Office Career Academy Electronic Delivery Middle School (Main Campus) Middle School (8th Grade Campus) No Delivery Required |

Select the purchase requisition category.
Select the shipping location.

The button to continue will display after the required shaded fields are complete.

Note: on the bottom of each section you will see yellow lines and a red line.
The yellow lines are the steps you need to complete to satisfy this section's required inputs
The red line will disappear only when all required inputs are completed.

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION
17-BUSN-2130

| Purchase requested by: | | | |
|------------------------|------------|-------|--------------------|
| Employee | Department | Role | Request Date |
| Christopher Worley | BUSN | Staff | September 24, 2019 |

| Select the purchase requisition category. | Shipping Location |
|--|---|
| <ul style="list-style-type: none"> Association/ Organization Fees Athletics - Middle School Athletics - Career Academy Athletics - General Conference/ Workshop Instructional Supplies Mileage Office Supplies Reimbursement Student Activity Technology - Middle School Technology - Career Academy Technology - General | <ul style="list-style-type: none"> Business Office Career Academy Electronic Delivery Middle School (Main Campus) Middle School (8th Grade Campus) No Delivery Required |

VENDOR DETAILS >>
Vendor

Now that the PR category and shipping locations options have been selected. The yellow and red lines have disappeared, and the option to go to "Vendor Details" appears. You can now move on to the next part of the PR.

Step 4: Vendor Details

In this section you will select the Vendor Details. The pull down lists shows vendors we have used most often.

Below are the two scenarios if the vendor you want to use is on the lists or not

If the vendor is on the list

Example: You want to purchase graduation supplies we would use Herff Jones

- Use the pulldown menu, find, and select “Herff Jones”.
 - If you accidentally chose the wrong vendor click “reset vendor”
- Review the information that populated and make sure the vendor information is correct. If it is click “Item Details”
-

| HAPEVILLE CHARTER SCHOOLS PURCHASE REQUISITION | | | |
|--|------------------------|-----------------|--------------------|
| VENDOR DETAILS | | | |
| <small>Select the vendor name from the list. If the vendor is not listed or the vendor details have changed, click the button to add or update the vendor details.</small> | | | |
| VENDOR NAME | | Herff Jones | |
| | | RESET VENDOR | ADD/ UPDATE VENDOR |
| <small>If you click the Reset Vendor button, the vendor name and information will be cleared.</small> | | | |
| ACCOUNT NUMBER | VENDOR WEBSITE | | |
| | N/A | | |
| VENDOR ADDRESS | | | |
| 4634 Lawrenceville Highway | | | |
| CITY | STATE | ZIP CODE | VENDOR PHONE |
| Lilburn | GA | 30047 | 770-921-9022 |
| CONTACT PERSON | VENDOR EMAIL | VENDOR NOTES | |
| | kim@herffjonesgrad.com | | |
| << REQUEST DETAILS | | ITEM DETAILS >> | |

If the vendor is NOT on the list

- Click on “ADD/UPDATE VENDOR”
- Enter the required information into the yellow fields
 - Try to enter information in the white fields if you can
- Once the required information you will be able to click on “ITEM DETAILS”

| HAPEVILLE CHARTER SCHOOLS PURCHASE REQUISITION | | | |
|--|---|-----------------|--------------------|
| VENDOR DETAILS | | | |
| <small>Select the vendor name from the list. If the vendor is not listed or the vendor details have changed, click the button to add or update the vendor details.</small> | | | |
| VENDOR NAME | | | |
| | | RESET VENDOR | ADD/ UPDATE VENDOR |
| <small>If you click the Reset Vendor button, the vendor name and information will be cleared.</small> | | | |
| ADD THE NEW VENDOR OR UPDATE A VENDOR'S INFORMATION | | | |
| VENDOR NAME | | | |
| | | | |
| ACCOUNT NUMBER | VENDOR WEBSITE (Enter N/A if the vendor does not have a website.) | | |
| | | | |
| VENDOR ADDRESS | | | |
| | | | |
| CITY | STATE | ZIP CODE | VENDOR PHONE |
| | | | |
| CONTACT PERSON | VENDOR EMAIL | VENDOR NOTES | |
| | | | |
| <small>Enter the new vendor's name. Enter the vendor's website. If the vendor does not have a website, enter N/A. Enter the vendor or employee's phone number to continue.</small> | | | |
| << REQUEST DETAILS | | ITEM DETAILS >> | |

Step 5: Enter the Item Detail

Item Lines

- You will need to **enter a separate line for each item** you are requesting.
- In the description make sure you are descriptive enough in case substitutes need to be made based on availability or price.

Expenses Information

- Category: most teachers will be using the Student Activities, Field Trip, Instruct Supplies, or Sports options
- Type: Use the pull down and select the option that fits best. If you need help contact Charlene Bussey at cbussey@hapevillcharter.org or ext 432.

Note: When you satisfy all the yellow lines the red line will not disappear, but the "Attachments" option will appear.

Click on

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

We are always tax exempt* you may need to ask the vendor for a W-9

| Item Details | | | | | |
|---|--------------|------------------------|-------------|--------|--|
| Item Number | QTY | Unit | Description | Price | Total |
| | | EA | | | \$0.00 |
| <input type="checkbox"/> Add an Additional Item | | | | | |
| Please be descriptive but BRIEF If a substitute needs to be made we need to know enough information to find alternatives | | | | | Subtotal \$0.00 Shipping Discount Credit Tax Total \$0.00 |
| Reason for Request | | | | | |
| Briefly explain why this this purchase is needed and how it will be used. | | | | | |
| Purpose of the Purchase/Reimbursement | | | | | |
| | | | | | |
| Category | Expense Type | Budget Name and Number | | Amount | |
| If the total cost needs to be split between multiple accounts, enter the amount that should be applied to each account. | | | | | |
| | | | | | \$0.00 |

Category: you will most likely choose Sports, Student Activities, or Instructional Supplies.
Expense Type: Find the best option that pertains to your PR. Contact cbussey@hapevillecharter.org or ext 432 for questions

Make sure you complete each task to make all the yellow lines disappear.
Note: in this section the red line does not disappear, but you will see the "Attachments" option appear.

Enter an item number for each row. If there is no item number, enter 0.

Enter the quantity for each item.

Enter an item description for each row.

Enter a price for each row.

If there is no shipping charge, enter 0.

Provide a reason for this purchase request.

Complete the required fields to continue to the next section.

<< REQUEST DETAILS

| | | | |
|--------|-----------------------|--------------------------------------|--------|
| Sports | HS - Athletic Directo | HS - Athletic Director 902-1105HS | \$1.00 |
| | | | |
| Total | | | \$1.00 |

Complete the required fields to continue to the next section.

<< REQUEST DETAILS
ATTACHMENTS >>

Step 6: Added Attachments

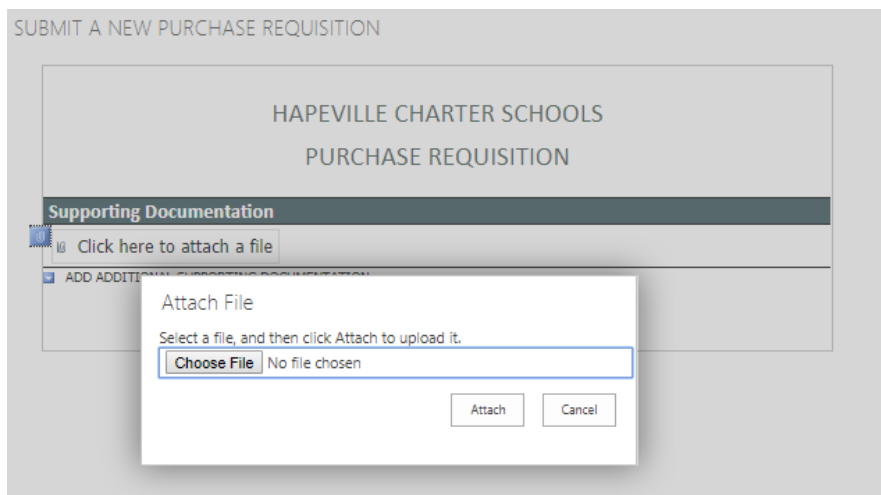
You need to provide documentation that substantiates the information you entered in Step 5. Typically you are able to upload a seller's **Quote**, a seller's order form, or a pdf of an online shopping cart.

After you upload the documentation, click on "View Summary" for the next step.

Quote v Invoice

A "quote" is a document generated by a seller that shows prices the seller is going to charge for an item and the total order. This means the items have not been purchased yet.

An "invoice" is a document generated by a seller after a company or individual agrees to buy the items. This means the items have been officially purchased. ***If you agree to purchase without prior approval (through the purchase requisition) you may have to purchase the items on your own, and request a reimbursement.***



Step 7: Request Summary and Completing the Request

Review all the information to ensure it is correct.

Click on "Submit New Purchase Request for Review" to complete the request.

You must receive the "Thank You" message

*If you do not finish the request by clicking "Submit New Purchase Request..." your request will be lost in "limbo", and you will need to redo the request.

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

REQUEST SUMMARY

Purchase requested by:

| Employee | Department | Role | Request Date |
|--------------------|------------|-------|--------------------|
| Christopher Worley | BUSN | Staff | September 24, 2019 |

Purchase Requisition Category **Shipping Location**
Association/ Organization Fees Business Office

Item Details

| Item Number | QTY | Unit | Description | Price | Total |
|-------------|-----|------|-------------|--------------|----------------|
| 1341 | 3 | EA | 123413 | \$25.00 | \$75.00 |
| | | | | Subtotal | \$75.00 |
| | | | | Shipping | \$0.00 |
| | | | | Discount | |
| | | | | Credit | |
| | | | | Tax | |
| | | | | Total | \$75.00 |

Purpose of the Purchase/Reimbursement
TEST TEST

Supporting Documentation
HCS Request System - Access Request.docx
14.31 KB
ADD ADDITIONAL SUPPORTING DOCUMENTATION

VENDOR STATUS Approved

VENDOR NAME
Amazon

ACCOUNT NUMBER **VENDOR WEBSITE (Enter N/A if the vendor does not have a website.)**
www.amazon.com

VENDOR ADDRESS

CITY **STATE** **ZIP CODE** **VENDOR PHONE**
888-280-4331

CONTACT PERSON **VENDOR EMAIL** **VENDOR NOTES**

Budget Details

You Must Click the "Submit New Purchase Request..." button below. If you do not, the request will not submit, and you will need to redo the request again.

Total \$75.00

SUBMIT NEW PURCHASE REQUEST FOR REVIEW

SUBMIT A NEW PURCHASE REQUISITION

Thank You

The purchase request has been submitted for review.

Close Request

**Your request is
Successfully Submitted
when you receive the
"Thank You"
message.**


Notes:



You can see the list of all the request you have submitted.


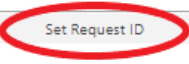
Under the “Request Status” column you will see the status of your Request.

- **Request Status**
 - Complete –the request is closed either because it was approved or rejected
 - Pending –the request was submitted successfully and is still in the approval process
 - **“Set Request ID” – the request was NOT submitted successfully and needs to be reentered.**
- **Next Reviewer**
 - You can see who still need to review. You can email the person indicated to see if they need more information.

REQUESTS SUBMITTED BY ME - FY2020



| Name | Requested By Display Name | Vendor Name | Requisition Total | Request Initial Date | Request Status | Next Reviewer | Business Office Status |
|--|---------------------------|---------------------|-------------------|----------------------|--|----------------------------------|------------------------|
| Request Status : Complete (2) | | | | | | | |
| 17-BUSN-1928 | Christopher Worley | Worley, Christopher | \$5.00 | 2019-07-23 | Complete | Review Complete | Pending Order |
| 17-BUSN-2021 | Christopher Worley | Office Depot | \$180.00 | 2019-08-13 | Complete | Review Complete | Pending Order |
| Request Status : Pending Business Office Initial Review (1) | | | | | | | |
| 17-BUSN-2133  | Christopher Worley | Amazon | \$75.00 | 2019-09-24 | Pending Business Office Initial Review | Business Office - Initial Review | Pending Order |
| Request Status : Set Request ID (1) | | | | | | | |
| 17-BUSN-2132  | Christopher Worley | Herff Jones | \$1.00 | 2019-09-24 | Set Request ID | | Pending Order |



HCS Request System

Entering a Reimbursement Request

You now have access to SharePoint and have successfully signed into the system. You are now able to enter a Purchase Requisition.

What can be reimbursed?

Employees can be reimbursed for mileage and other travel expenses per the Employee Handbook. In extreme circumstances employees may be given pre-approval to make purchases using her/his money and be reimbursed after the purchase has been made.

*You are responsible to know the employee handbook policies including travel expenses, making purchases, reimbursements, and check request.

There are two types of reimbursement requests. This document outlines the process for both.

- Reimbursement Request for Mileage
- Reimbursement Request for other Travel Expenses and School Purchases

Before you begin:

Things to know about the Request System

Each section you will need to enter necessary information. Below each section you will see a set of yellow lines informing you what needs to be entered. As you satisfy each input the yellow lines will disappear. Once you complete all inputs and all the yellow lines have disappeared, the “button” for the next section will appear, and you can move forward with the request.

The screenshot displays a web-based form for entering a reimbursement request. At the top, a red bar contains the instruction: "Complete the required fields to continue to the next section." Below this bar is a grey button labeled "<< REQUEST DETAILS".

The form itself consists of several rows of yellow instructional lines:

- Enter an item number for each row. If there is no item number, enter N/A.
- Enter the quantity for each item.
- Enter an item description for each row.
- Enter a price for each row.
- If there is no shipping charge, enter 0.
- Provide a reason for this purchase request.

Below the yellow lines is another red bar with the same instruction: "Complete the required fields to continue to the next section." Underneath this bar are two grey buttons: "<< REQUEST DETAILS" and "ATTACHMENTS >>". The "ATTACHMENTS >>" button is circled in green.

The form also includes a table with the following data:

| | | | |
|--------|-----------------------|--------------------------------------|--------|
| Sports | HS - Athletic Directo | HS - Athletic Director 902-1105HS | \$1.00 |
| | | | |
| Total | | | \$1.00 |

REIMBURSEMENT REQUEST -MILEAGE-

Before you start you will need

- The Starting and Ending odometer reading from your car.
- A digital copy of confirmation: typically an email regarding an off-site training/professional development or registration confirmation for conferences approved by your supervisor.
- A digital copy of the **google** directions from your starting location to your end location
 - Use google to get the directions (click here for instructions)
 - Directions must be the shortest distance between the school building and the destination
 - Day Trips
 - Your starting location is always the school building your primarily work report to
 - Overnight Trips
 - Contact the Business Office to review process.
 - Employees who travel between middle school campuses for **daily** responsibilities
 - You will receive additional instructions

Notes about mileage:

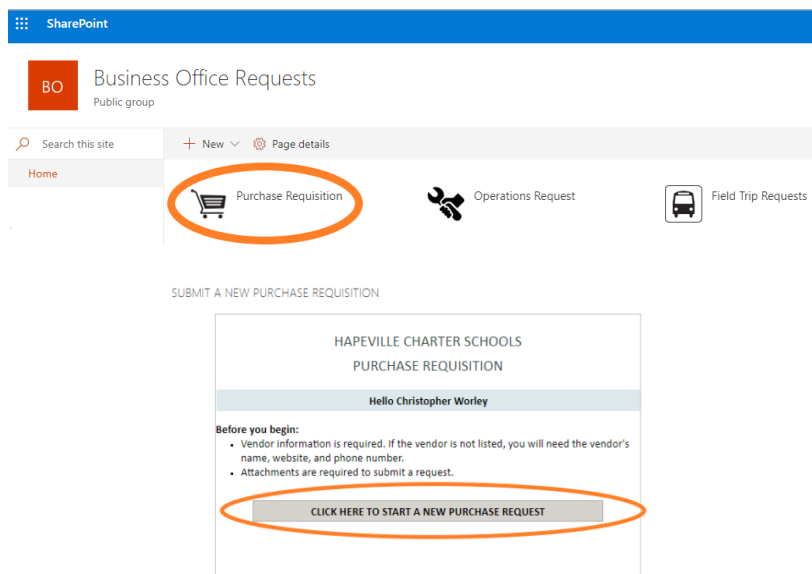
- Mileage is reimbursed at \$0.50
- Only mileage traveled by the employee for official business is reimbursable.
- Overnight trips that require air travel – trips to and from the airport are **not** reimbursable.

Start your mileage reimbursement request

Step 1: Sign into the Request System

- <https://hapevillecharterschools.sharepoint.com/sites/BusinessOfficeRequests>
- Make sure you are signed in with your [name]@hvcharter.org log in and not your @fultonschools.org login

Step 2: Select the Purchase Requisition Option and click “CLICK HERE TO START A NEW PURCHASE REQUEST”



The screenshot shows the SharePoint interface for Business Office Requests. The top navigation bar is blue with the SharePoint logo and the text "SharePoint". Below this, the site title "Business Office Requests" is displayed with a "Public group" label. A search bar and "Page details" link are visible. The main content area features three options: "Purchase Requisition" (with a shopping cart icon), "Operations Request" (with a wrench icon), and "Field Trip Requests" (with a bus icon). The "Purchase Requisition" option is circled in orange. Below these options, there is a section titled "SUBMIT A NEW PURCHASE REQUISITION" which contains a form. The form header reads "HAPEVILLE CHARTER SCHOOLS PURCHASE REQUISITION" and includes a personalized greeting "Hello Christopher Worley". Under the heading "Before you begin:", there are two bullet points: "Vendor information is required. If the vendor is not listed, you will need the vendor's name, website, and phone number." and "Attachments are required to submit a request." At the bottom of the form, a button labeled "CLICK HERE TO START A NEW PURCHASE REQUEST" is circled in orange.

Step 3: Select the purchase requisition category and shipping location

- **Category:** choose "Mileage"
- **Shipping Location:** choose "No Delivery Required"

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION
17-BUSN-2130

| Purchase requested by: | | | |
|------------------------|------------|-------|--------------------|
| Employee | Department | Role | Request Date |
| Christopher Worley | BUSN | Staff | September 24, 2019 |

| Select the purchase requisition category. | Shipping Location |
|--|---|
| <ul style="list-style-type: none"> Association/ Organization Fees Athletics - Middle School Athletics - Career Academy Athletics - General Conference/ Workshop Instructional Supplies Mileage Office Supplies Reimbursement Student Activity Technology - Middle School Technology - Career Academy Technology - General | <ul style="list-style-type: none"> Business Office Career Academy Electronic Delivery Middle School (Main Campus) Middle School (8th Grade Campus) No Delivery Required |

Select the purchase requisition category.
Select the shipping location.

The button to continue will display after the required shaded fields are complete.

Note: on the bottom of each section you will see yellow lines and a red line.
The yellow lines are the steps you need to complete to satisfy this section's required inputs
The red line will disappear only when all required inputs are completed.

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION
17-BUSN-2134

| Purchase requested by: | | | |
|------------------------|------------|-------|--------------------|
| Employee | Department | Role | Request Date |
| Christopher Worley | BUSN | Staff | September 25, 2019 |

| Select the purchase requisition category. | Shipping Location |
|---|--|
| <ul style="list-style-type: none"> Association/ Organization Fees Athletics - Middle School Athletics - Career Academy Athletics - General Conference/ Workshop Instructional Supplies <li style="background-color: #cccccc;">Mileage Office supplies Reimbursement Student Activity Technology - Middle School Technology - Career Academy Technology - General | <ul style="list-style-type: none"> Business Office Career Academy Electronic Delivery Middle School (Main Campus) Middle School (8th Grade Campus) <li style="background-color: #cccccc;">No Delivery Required |

VENDOR DETAILS >>
Mileage/Reimbursement

Step 4: Vendor Details (You Are The Vendor)

This section you will need to use the pull down menu to select your name; for reimbursements you are the vendor.

Input your contact information. Once you have entered your contact information the yellow lines will disappear and you can click on "Item Details" to go to the next section.

*If you do not see your name on the pull down menu contact the Business Office.

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

EMPLOYEE DETAILS FOR MILEAGE AND REIMBURSEMENT REQUESTS

EMPLOYEE NAME
▼
Worley, Christopher

CITY STATE ZIP CODE EMPLOYEE PHONE

PAYEE NOTES

Enter the new vendor's name.
Enter the employee's phone number.
Enter the city.
Enter the state.
Enter the zip code.
Enter the employee address.

<< REQUEST DETAILS ITEM DETAILS >>



SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

EMPLOYEE DETAILS FOR MILEAGE AND REIMBURSEMENT REQUESTS

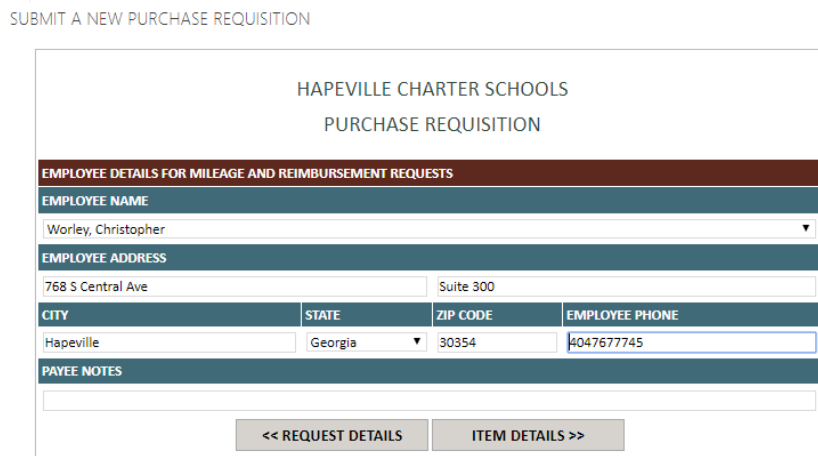
EMPLOYEE NAME
Worley, Christopher

EMPLOYEE ADDRESS
768 S Central Ave Suite 300

CITY STATE ZIP CODE EMPLOYEE PHONE
Hapeville Georgia 30354 4047677745

PAYEE NOTES

<< REQUEST DETAILS ITEM DETAILS >>



Step 5: Enter the Item Detail (Trips)

Item Lines (Each Item Line = Each Leg of Your Trip)

- You will need to **enter a "item" for each leg of your trip** you are requesting reimbursement.
- In the description make sure you are descriptive enough in case substitutes need to be made based on availability or price.

Expenses Information

- Category: for mileage reimbursement always choose "Employee Expenses"
- Type: for mileage reimbursement always choose "Employee Expenses" for either MS or HS
- Contact Charlene Bussey if you have questions cbussey@hapevillecharte.org or ext 432

Note: When you satisfy all the yellow lines the red line will not disappear, but the "Attach Documents" option will appear.

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS PURCHASE REQUISITION

One Item = One Leg of Trip

| Mileage Details | | | |
|--|---|---|---------------------------|
| Complete a section for each destination. | | | |
| Trip Date | Briefly Describe the Purpose of this Trip | | |
| 9/25/2019 | Training at Fulton County School Title I | | |
| Starting Address | Odometer Start | Destination Address | Odometer End |
| 768 S. Central Ave, 300, Hapeville, GA 30... | 95,000.0 | 6201 Powers Ferry Rd NW, Atlanta, GA... | 95,022.0 |
| Attach Documentation | Total Trip Miles | Mileage Rate | Trip Reimbursement Amount |
| Attach documentation on the next page. | 22 | \$0.50 | \$11.00 |

First Leg

| Mileage Details | | | |
|---|---|--|---------------------------|
| Complete a section for each destination. | | | |
| Trip Date | Briefly Describe the Purpose of this Trip | | |
| 9/25/2019 | Training at Fulton County School Title I (Return) | | |
| Starting Address | Odometer Start | Destination Address | Odometer End |
| 6201 Powers Ferry Rd NW, Atlanta, GA 3... | 95,022.0 | 768 S. Central Ave, 300, Hapeville, GA ... | 95,044.0 |
| Attach Documentation | Total Trip Miles | Mileage Rate | Trip Reimbursement Amount |
| Attach documentation on the next page. | 22 | \$0.50 | \$11.00 |

Second Leg (return)

If you need to add a leg click on "insert item"

This part totals the reimbursement for all items

| Category | Expense Type | Budget Name and Number | Amount |
|---|---------------------|----------------------------------|----------------|
| If the total cost needs to be split between multiple accounts, enter the amount that should be applied to each account. | | | |
| Employee Expenses | Employee Expenses I | Employee Expenses MS 580-1000 | \$22.00 |
| | | | |
| Total | | | \$22.00 |

Enter the Total Miles

**Category: Always Employee Expenses
Type: Pick "Employee Expenses" and the school you work for (MS or HS)**

Complete the required fields to continue to the next section.

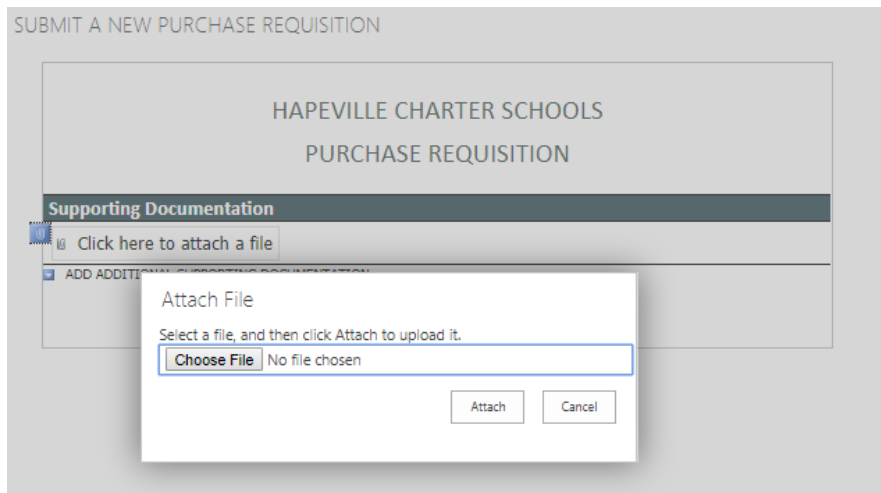
Step 6: Document Attachments to Upload

You need to provide documentation that substantiates the information you entered on your request.

For mile reimbursement you will need to attach the following:

- **Good Map Directions**
 - Must be shortest distance
 - Starting location
 - Day Trips is always the work location you primarily report to
 - Overnight Trips (if you drive) is the work location you primarily report to
- **Confirmation of Trip/Approval**
 - Typically email confirmation of meeting/training/professional development
 - Can also be registration of conference/workshops
 - If you have questions contact Charlene Bussey cbussey@hapevillecharter.org ext 432

After you upload the documentation, click on “View Summary” for the next step.



Step 7: Request Summary and Completing the Request

Review all the information to ensure it is correct.

Click on "Submit New Purchase Request for Review" to complete the request.

You must receive the "Thank You" message

*If you do not finish the request by clicking "Submit New Purchase Request..." your request will be lost in "limbo", and you will need to redo the request.

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

REQUEST SUMMARY

Purchase requested by:

| Employee | Department | Role | Request Date |
|--------------------|------------|-------|--------------------|
| Christopher Worley | BUSN | Staff | September 25, 2019 |

Purchase Requisition Category **Shipping Location**

Mileage No Delivery Required

VENDOR STATUS

EMPLOYEE NAME

Worley, Christopher

EMPLOYEE ADDRESS

768 S Central Ave Suite 300

| CITY | STATE | ZIP CODE | EMPLOYEE PHONE |
|-----------|---------|----------|----------------|
| Hapeville | Georgia | 30354 | 4047677745 |

PAYEE NOTES

| Trip Date | Trip Purpose & Documentation | Addresses | Odometer Readings | Mileage & Rate | Total |
|------------------------------------|---|---|------------------------------|-------------------------|---------|
| 9/25/2019 | Purpose Training at Fulton County School Title I | Starting Address 768 S. Central Ave, 300, Hapeville, GA 30354 | Starting 95,000.00 | Mileage 22.00 | \$11.00 |
| | Documentation Click here to attach a file | Ending 6201 Powers Ferry Rd NW, Atlanta, GA 30339 | Ending 95,022.00 | Rate \$0.50 | |
| 9/25/2019 | Purpose Training at Fulton County School Title I (Return) | Starting Address 6201 Powers Ferry Rd NW, Atlanta, GA 30339 | Starting 95,022.00 | Mileage 22.00 | \$11.00 |
| | Documentation Click here to attach a file | Ending 768 S. Central Ave, 300, Hapeville, GA 30354 | Ending 95,044.00 | Rate \$0.50 | |
| Mileage Total Reimbursement | | | | | \$22.00 |

You Must Click the "Submit New Purchase Request..." button below. If you do not, the request will not submit, and you will need to redo the request again.

SUBMIT NEW PURCHASE REQUEST FOR REVIEW

WAIT A NEW PURCHASE REQUISITION

Thank You

The purchase request has been submitted for review.

[Close Request](#)

**Your request is
Successfully Submitted
when you receive the
"Thank You"
message.**


Check to make sure your request was submitted correct:



You can see the list of all the request you have submitted.

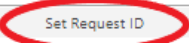

Under the “Request Status” column you will see the status of your Request.

- **Request Status**
 - Complete –the request is closed either because it was approved or rejected
 - Pending –the request was submitted successfully and is still in the approval process
 - **“Set Request ID” – the request was NOT submitted successfully and needs to be reentered.**
- **Next Reviewer**
 - You can see who still need to review. You can email the person indicated to see if they need more information.

REQUESTS SUBMITTED BY ME - FY2020



| Name | Requested By Display Name | Vendor Name | Requisition Total | Request Initial Date | Request Status | Next Reviewer | Business Office Status |
|--|---------------------------|---------------------|-------------------|----------------------|--|----------------------------------|------------------------|
| Request Status : Complete (2) | | | | | | | |
| 17-BUSN-1928 | Christopher Worley | Worley, Christopher | \$5.00 | 2019-07-23 | Complete | Review Complete | Pending Order |
| 17-BUSN-2021 | Christopher Worley | Office Depot | \$180.00 | 2019-08-13 | Complete | Review Complete | Pending Order |
| Request Status : Pending Business Office Initial Review (1) | | | | | | | |
| 17-BUSN-2133  | Christopher Worley | Amazon | \$75.00 | 2019-09-24 | Pending Business Office Initial Review | Business Office - Initial Review | Pending Order |
| Request Status : Set Request ID (1) | | | | | | | |
| 17-BUSN-2132  | Christopher Worley | Herff Jones | \$1.00 | 2019-09-24 | Set Request ID | | Pending Order |



Getting a digital copy of Google Directions:

Step 1: Get the directions on google maps

- If you need help getting directions on google maps click here >> [Google Maps How To](#)

Step 2: Save the directions as a PDF

- <https://helpx.adobe.com/acrobat/using/print-to-pdf.html>

HCS Request System

Entering a Mileage Reimbursement Request For Daily Middle School Travel ONLY

For Hapeville Charter Middle School (HCMS) employees whose primary daily responsibilities include traveling between the Main Campus in Hapeville, GA and the 8th Grade campus.

Follow the instructions on the “HCS Request System – Mileage Reimbursement Request” with the exceptions of “**Step 5: Enter the Item Detail (Trips)**” and “**Step 6: Added Attachments**”.

Per Google Maps the shortest distance between campuses is 8.6 miles. This is the amount you will use for each trip between campuses.

Use this guide for **Step 5 and Step 6**

“Step 5: Enter the Item Detail (Trips) – for Daily Middle School Travel”

- Enter the sum of mileage for all trips between the Main Campus and the 8th Grade Campus for the entire calendar month as one “Item”.
- Calendar Month: You must enter the mileage for the entire calendar month (all dates within the month) [opposed to the dates in the last 30 days].
- **Deadline: You must have the request submitted before the 10th of each month.**

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

| Mileage Details | | | |
|---|--|----------------------------------|---------------------------|
| Complete a section for each destination. | | | |
| Trip Date | Briefly Describe the Purpose of this Trip | | |
| 9/1/2019 | September Daily Middle School Mileage (total 10 trips) | | |
| Starting Address | Odometer Start | Destination Address | Odometer End |
| 3535 South Fulton Ave | 0.0 | 6045 | 86.0 |
| Attach Documentation | Total Trip Miles | Mileage Rate | Trip Reimbursement Amount |
| Attach documentation on the next page. | 100 | \$0.50 | \$43.00 |
| <input type="checkbox"/> Insert Item Total Reimbursement Amount \$43.00 | | | |
| Category | Expense Type | Budget Name and Number | Amount |
| If the total cost needs to be split between multiple accounts, enter the amount that should be applied to each account. | | | |
| Employee Expenses | Employee Expenses | Employee Expenses MS 580-1000 | \$43.00 |
| 4a | 4b | 4c | |
| Total | | | \$43.00 |

Complete the required fields to continue to the next section.

- 1: Enter the first day of the month
- 2: For description indicate the calendar month, middle school daily travel, and the number of trips between campuses.
- 3: Enter 3535 South Fulton as the starting address and 6045 Buffington as the destination. Enter 0.0 for the odometer start and the total miles driven between campuses for the month in odometer end. Per Google Maps the shortest distance is 8.6 miles between campuses. **(8.6 miles X # of trips) = Total Miles Driven.**
- 4a: Choose Employee Expense
- 4b: Choose Employee Expense MS
- 4c: Enter the total miles driven.

Step 6: Document Attachments to Upload

- What attachments will need to upload into the request system:
 - Word Document or Excel spreadsheet that lists all trip dates and time you made between the campuses
 - Google Directions (digital copies) for one leg between 3535 South Fulton Ave and 6045 Buffington Road

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

| Supporting Documentation |
|---|
| <input style="width: 100%;" type="button" value=" Click here to attach a file "/> |
| <input checked="" type="checkbox"/> ADD ADDITIONAL SUPPORTING DOCUMENTATION |
| <input style="margin-right: 20px;" type="button" value=" << ITEM DETAILS "/> <input style="margin-right: 20px;" type="button" value=" VIEW SUMMARY >> "/> |

Continue with the rest of the Mileage Reimbursements process with “**Step 7: Request Summary and Completing the Request**” on the main Mileage Reimbursement Request Guide. **Make sure you complete the request and you receive the “Thank You” Message.**

HCS Request System

Entering an Reimbursement for Travel Expenses and School Purchases

You now have access to SharePoint and have successfully signed into the system. You are now able to enter a Purchase Requisition.

What can be reimbursed?

Employees can be reimbursed for mileage and other travel expenses per the Employee Handbook. In extreme circumstances employees may be given pre-approval to make purchases using her/his money and be reimbursed after the purchase has been made.

*You are responsible to know the employee handbook policies including travel expenses, making purchases, reimbursements, and check request.

There are two types of reimbursement requests. This document outlines the process for both.

- Reimbursement Request for Mileage
- Reimbursement of Purchase Request for other Travel Expenses and School Purchases

Things to know about the Request System

Each section you will need to enter necessary information. Below each section you will see a set of yellow lines informing you what needs to be entered. As you satisfy each input the yellow lines will disappear. Once you complete all inputs and all the yellow lines have disappeared, the “button” for the next section will appear, and you can move forward with the request.

The screenshot displays a web-based form for entering purchase request details. At the top, a red bar contains the text "Complete the required fields to continue to the next section." Below this bar are several yellow lines with instructional text: "Enter an item number for each row. If there is no item number, enter N/A.", "Enter the quantity for each item.", "Enter an item description for each row.", "Enter a price for each row.", "If there is no shipping charge, enter 0.", and "Provide a reason for this purchase request." Below the yellow lines is a grey button labeled "<< REQUEST DETAILS".

Below the first form section is a second form section. It contains several dropdown menus and text input fields. The first dropdown is labeled "Sports" and is set to "Sports". The second dropdown is labeled "HS - Athletic Directo" and is set to "HS - Athletic Directo". The text input field contains "HS - Athletic Director" and "902-1105HS". To the right of these fields is a text input field containing "\$1.00". Below these fields is a "Total" label and another text input field containing "\$1.00". A red bar at the bottom of this section contains the text "Complete the required fields to continue to the next section." Below this bar are two grey buttons: "<< REQUEST DETAILS" and "ATTACHMENTS >>". The "ATTACHMENTS >>" button is circled in green.

REIMBURSEMENT REQUEST

-Travel Expenses and Other Purchases-

Before you start you will need

- **An itemized receipt for each purchase you are requesting reimbursement.**
 - **An itemized receipt should have the following (must be visible)**
 - The vendor's name and location
 - Date of transaction
 - List of each item/service proved
 - Subtotal, Tax Total, and Total (tip amount if applicable)
 - **If an itemized receipt is from a restaurant additional information is necessary**
 - Transaction (signature) receipt with tip amount
 - HCS will only reimburse up to 18% of the Total purchase
 - **NO ALCOHOL ALLOWED ON RECEIPT**
 - Requests with alcohol listed on receipts will be rejected
- **Documentation of Prior Approval**
 - Approved overnight trip expenses are outlined in the employee handbook.
 - Email with the executive directors approval to purchase non-trip expenses.

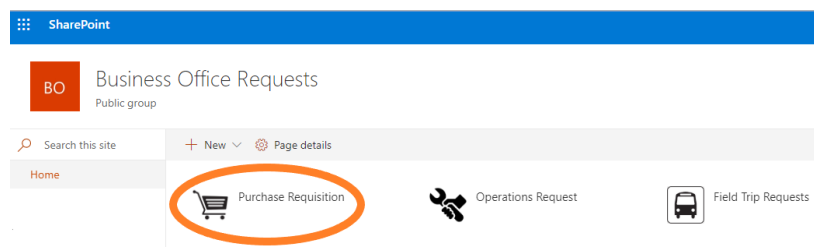
***Note about receipts: ask the vendor to complete two transactions – one transaction for reimburse request and a second transaction for personal expenses that won't be reimbursed.**

Example: if the executive directors approves for you to go to Walmart to buy juice boxes, and you want to buy yourself a soda while you are there. Have the cashier ring the school purchase on one transaction and your soda on another transaction. This will eliminate any confusion and possible request rejection.

Step 1: Login to the Request System

- <https://hapevillecharterschools.sharepoint.com/sites/BusinessOfficeRequests>
- **Make sure you are signed in with your [name]@hvcharter.org log in and not your @fultonschools.org login**

Step 2: Select the Purchase Requisition Option



The screenshot shows the SharePoint interface for Business Office Requests. The navigation bar includes 'Home', 'Purchase Requisition' (circled in orange), 'Operations Request', and 'Field Trip Requests'. Below the navigation bar, there is a section titled 'SUBMIT A NEW PURCHASE REQUISITION' with a button labeled 'CLICK HERE TO START A NEW PURCHASE REQUEST' (circled in orange).

Step 3: Select the purchase requisition category and shipping location

- **Category:** Choose “Reimbursement” contact Charlene Bussey at cbussey@hapevillecharter.org or extension 432
- **Shipping Location:** Choose “No Delivery Required”

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION
17-BUSN-2130

| Purchase requested by: | | | |
|------------------------|------------|-------|--------------------|
| Employee | Department | Role | Request Date |
| Christopher Worley | BUSN | Staff | September 24, 2019 |

| Select the purchase requisition category. | Shipping Location |
|--|---|
| <ul style="list-style-type: none"> Association/ Organization Fees Athletics - Middle School Athletics - Career Academy Athletics - General Conference/ Workshop Instructional Supplies Mileage Office Supplies Reimbursement Student Activity Technology - Middle School Technology - Career Academy Technology - General | <ul style="list-style-type: none"> Business Office Career Academy Electronic Delivery Middle School (Main Campus) Middle School (8th Grade Campus) No Delivery Required |

Select the purchase requisition category.
Select the shipping location.
The button to continue will display after the required shaded fields are complete.

Note: on the bottom of each section you will see yellow lines and a red line.
 The yellow lines are the steps you need to complete to satisfy this section's required inputs
 The red line will disappear only when all required inputs are completed.

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION
17-BUSN-2140

| Purchase requested by: | | | |
|------------------------|------------|-------|--------------------|
| Employee | Department | Role | Request Date |
| Christopher Worley | BUSN | Staff | September 26, 2019 |

| Select the purchase requisition category. | Shipping Location |
|---|--|
| <ul style="list-style-type: none"> Association/ Organization Fees Athletics - Middle School Athletics - Career Academy Athletics - General Conference/ Workshop Instructional Supplies Mileage Office Supplies <li style="background-color: #0070C0; color: white;">Reimbursement Student Activity Technology - Middle School Technology - Career Academy Technology - General | <ul style="list-style-type: none"> Business Office Career Academy Electronic Delivery Middle School (Main Campus) Middle School (8th Grade Campus) <li style="background-color: #cccccc;">No Delivery Required |

VENDOR DETAILS >>
Mileage/Reimbursement

When the category and shipping location options have been selected, the yellow and red lines will disappear and "Vendor Details" option appears. Click on "Vendor Details" to move on to the next section.

Step 4: Vendor Details (For Reimbursements – You Are The Vendor)

In this section you will add your information as the vendor.

Enter Your Information As The Vendor

- Use the pull down menu and select your name.
 - If your name does not appear contact cbussey@hapevillecharter.org or ext 432
- Enter your contact information and make sure the yellow lines disappear.
- Once the required information is entered, you will be able to click on “ITEM DETAILS”

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

EMPLOYEE DETAILS FOR MILEAGE AND REIMBURSEMENT REQUESTS

EMPLOYEE NAME
Worley, Christopher

CITY STATE ZIP CODE EMPLOYEE PHONE

PAYEE NOTES

Enter the new vendor's name.
Enter the employee's phone number.
Enter the city.
Enter the state.
Enter the zip code.
Enter the employee address.

<< REQUEST DETAILS ITEM-DETAILS >>

SUBMIT A NEW PURCHASE REQUISITION

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

EMPLOYEE DETAILS FOR MILEAGE AND REIMBURSEMENT REQUESTS

EMPLOYEE NAME
Worley, Christopher

EMPLOYEE ADDRESS
768 S. Central Ave Suite 300

CITY STATE ZIP CODE EMPLOYEE PHONE
Hapeville Georgia 30354 H04-767-7745 ext 417

PAYEE NOTES

<< REQUEST DETAILS ITEM DETAILS >>

Step 5: Enter the Item Detail

Enter Reimbursement Items (One Item = One Receipt)

- Enter the information for each receipt as an Item Line.
 - Enter the required information: Purchase Date, Vendor Name, Receipt Total, and Reason for Purchase.
- **If you have multiple receipts – click on “Insert Item” to add a new**

Expenses Information

- Category: most teachers will be using the Student Activities, Field Trip, Instruct Supplies, or Sports options
- Type: Use the pull down and select the option that fits best. If you need help contact Charlene Bussey at cbussey@hapevillcharter.org or ext 432.

After you have entered all receipts and information for the reimbursement click on “Attach Document”.

Note: When you satisfy all the yellow lines the red line will not disappear, but the “Attachments” option will appear.

The screenshot shows the 'HAPEVILLE CHARTER SCHOOLS PURCHASE REQUISITION' form. It includes sections for 'Reimbursement Items', 'Reason for Purchase', and 'Expenses Information'. Annotations include orange arrows pointing to input fields for 'Purchase Date', 'Vendor', and 'Reimbursement Amount'. A green box highlights the 'Total Reimbursement Amount' section with the text 'This section adds the totals for all receipts'. A pink box points to the 'Amount' field in the 'Expenses Information' table with the text 'Enter the total reimbursement amount here.' A red bar at the bottom contains the text 'Continue to the next section.' and two buttons: '<< REQUEST DETAILS' and 'ATTACH DOCUMENTATION >>'.

| Category | Expense Type | Budget Name and Number | Amount |
|-------------------|-------------------|------------------------------------|---------|
| Employee Expenses | Employee Expenses | Employee Expenses HS 580-1005HS | \$10.00 |
| Total | | | \$10.00 |

Step 6: Added Attachments

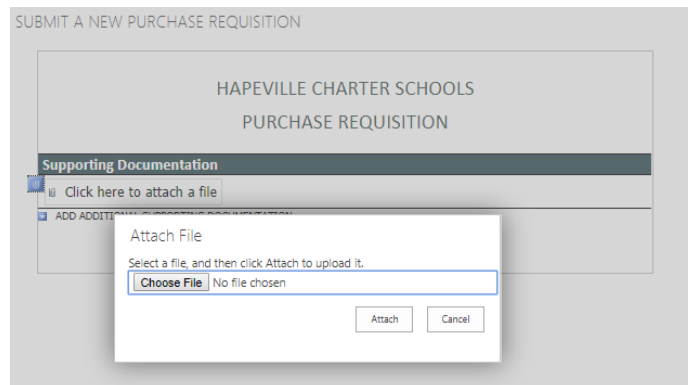
You need to provide documentation that substantiates the information you entered in Step 5. Typically you need to upload an itemized receipt (read below) or an invoice. For non-travel reimbursement of purchases, you must upload documentation that the purchase was approved by the Executive Director.

- **An itemized receipt for each purchase you are requesting reimbursement.**
 - **An itemized receipt should have the following (must be visible)**
 - The vendor's name and location
 - Date of transaction
 - List of each item/service provided
 - Subtotal, Tax Total, and Total (tip amount if applicable)
 - **If an itemized receipt is from a restaurant additional information is necessary**
 - Transaction (signature) receipt with tip amount
 - HCS will only reimburse up to 18% of the Total purchase
 - **NO ALCOHOL ALLOWED ON RECEIPT**
 - Requests with alcohol listed on receipts will be rejected
- **Documentation of Prior Approval**
 - Approved overnight trip expenses are outlined in the employee handbook.
 - Email with the executive directors approval to purchase non-trip expenses.

***Note about receipts: ask the vendor to complete two transactions – one transaction for reimburse request and a second transaction for personal expenses that won't be reimbursed.**

Example: if the executive directors approves for you to go to Walmart to buy juice boxes, and you want to buy yourself a soda while you are there. Have the cashier ring the school purchase on one transaction and your soda on another transaction. This will eliminate any confusion and possible request rejection.

After you upload the documentation, click on "View Summary" for the next step.



Step 7: Request Summary and Completing the Request

Review all the information to ensure it is correct.

Click on "Submit New Purchase Request for Review" to complete the request.

You must receive the "Thank You" message

*If you do not finish the request by clicking "Submit New Purchase Request..." your request will be lost in "limbo", and you will need to redo the request.

HAPEVILLE CHARTER SCHOOLS
PURCHASE REQUISITION

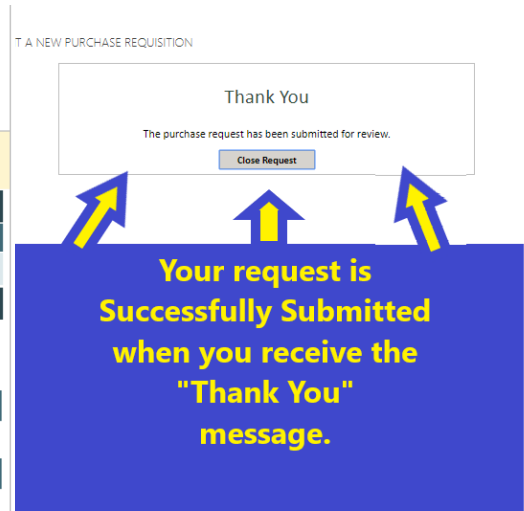
REQUEST SUMMARY

| Purchase requested by: | | | | |
|-------------------------------|----------------------|---|---|---------|
| Employee | Department | Role | Request Date | |
| Christopher Worley | BUSN | Staff | September 26, 2019 | |
| Purchase Requisition Category | | Shipping Location | | |
| Reimbursement | | No Delivery Required | | |
| VENDOR STATUS | | | | |
| EMPLOYEE NAME | | | | |
| Worley, Christopher | | | | |
| EMPLOYEE ADDRESS | | | | |
| 768 S. Central Ave | | Suite 300 | | |
| CITY | STATE | ZIP CODE | EMPLOYEE PHONE | |
| Hapeville | Georgia | 30354 | 404-767-7745 ext 417 | |
| PAYEE NOTES | | | | |
| | | | | |
| Reimbursement Items | | | | |
| Date | Vendor | Supporting Documentation | Reason for Purchase | Amount |
| 2019-09-26T00:00:00 | Walmart | Click here to attach a file | Had to buy juice boxed. Executive Director approved on 9/26/2019 by email | \$10.00 |
| Reimbursement Total | | | | \$10.00 |
| Budget Details | | | | |
| Category | Expense Type | Budget Name and Number | Amount | |
| Employee Expenses | Employee Expenses HS | Employee Expenses HS 580-1005HS | Total | \$75.00 |

Total \$10.00

Total \$75.00

SUBMIT NEW PURCHASE REQUEST FOR REVIEW




Notes:



You can see the list of all the request you have submitted.


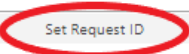
Under the “Request Status” column you will see the status of your Request.

- **Request Status**
 - Complete –the request is closed either because it was approved or rejected
 - Pending –the request was submitted successfully and is still in the approval process
 - **“Set Request ID” – the request was NOT submitted successfully and needs to be reentered.**
- **Next Reviewer**
 - You can see who still need to review. You can email the person indicated to see if they need more information.

REQUESTS SUBMITTED BY ME - FY2020



| Name | Requested By Display Name | Vendor Name | Requisition Total | Request Initial Date | Request Status | Next Reviewer | Business Office Status |
|--|---------------------------|---------------------|-------------------|----------------------|--|----------------------------------|------------------------|
| Request Status : Complete (2) | | | | | | | |
| 17-BUSN-1928 | Christopher Worley | Worley, Christopher | \$5.00 | 2019-07-23 | Complete | Review Complete | Pending Order |
| 17-BUSN-2021 | Christopher Worley | Office Depot | \$180.00 | 2019-08-13 | Complete | Review Complete | Pending Order |
| Request Status : Pending Business Office Initial Review (1) | | | | | | | |
| 17-BUSN-2133  | Christopher Worley | Amazon | \$75.00 | 2019-09-24 | Pending Business Office Initial Review | Business Office - Initial Review | Pending Order |
| Request Status : Set Request ID (1) | | | | | | | |
| 17-BUSN-2132  | Christopher Worley | Herff Jones | \$1.00 | 2019-09-24 | Set Request ID | | Pending Order |



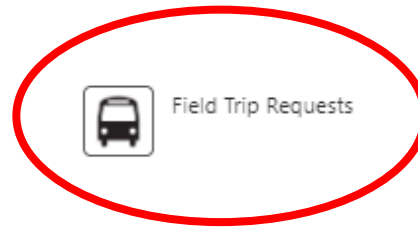
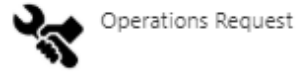
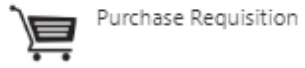
Entering a Field Trip Request

- Before you start you need to:
 - Plan your trip: Destination, dates, times, how it correlates to the curriculum...
 - Present your trip to your Principal and get her/his consent.
 - Gather your documents that show all destinations and any costs for admittance.

Log into SharePoint through Office 365

- SharePoint is an app within Office365. This is the system HCS uses for the request system.
- Use this link for SharePoint:
 - <https://hapevillecharterschools.sharepoint.com/sites/BusinessOfficeRequests>
 - Make sure you are signed in with your [name]@hvcharter.org log in and not your **@fultonschools.org** login
- To login use your Office 365 username and password.

- **You should have access to Office 365 from HCS's IT department**
 - Your username has **@hvcharter.org** (not **@hapevillecharter.org**)



Comments



Add a comment. Type @ to mention someone

Post

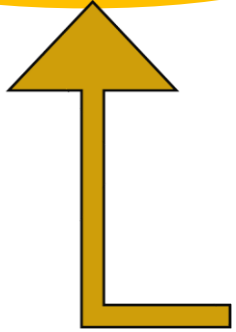
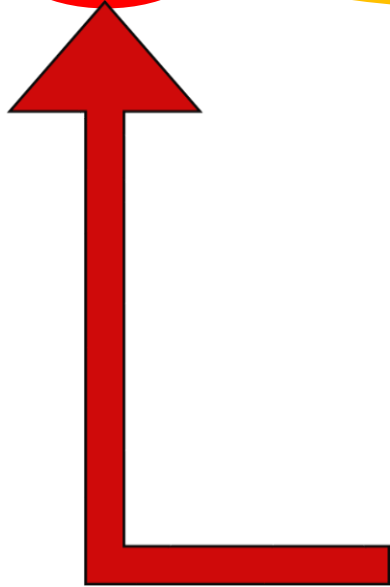
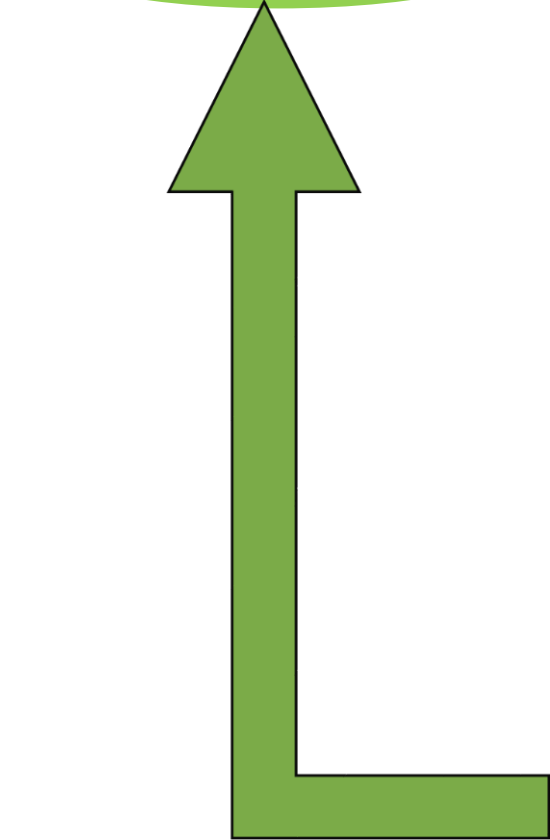
When you log into SharePoint through Office 365, you will click on the “Field Trip Requests” to complete a trip requests.

TRIP REQUEST

cworley_20191002112329

| REQUEST SUBMITTED BY | SCHOOL | REQUESTED BY JOB ROLE |
|----------------------|-----------------|-------------------------|
| Christopher Worley | Business Office | Human Resources Manager |

| | | | | |
|---------|------------|------------|-------|---------|
| DETAILS | ACTIVITIES | BUS | MEALS | LODGING |
|---------|------------|------------|-------|---------|



Overnight Trips ONLY

**contact the Business Office for process.*

Step 3: Enter Bus Parking Fee

Enter the parking fee for buses.

The Field Trip Coordinator will enter most information.

Steps 1 and 2: Complete for all Academic and Student Activity Trips.

TRIP REQUEST

cworley_20191002112329

| | | | | | |
|--|-----------------------------|--|----------------------|----------------------|------------|
| REQUEST SUBMITTED BY Christopher Worley | SCHOOL Business Office | REQUESTED BY JOB ROLE Human Resources Manager | | | |
| DETAILS | ACTIVITIES | BUS | MEALS | LODGING | |
| TRIP TYPE | | | | | |
| SELECT THE TYPE OF TRIP | | LENGTH OF TRIP | DEPARTURE DATE | RETURN DATE | |
| <input type="radio"/> INSTRUCTIONAL A | | <input type="radio"/> DAY TRIP B | <input type="text"/> | <input type="text"/> | |
| <input type="radio"/> SPORTS | | <input type="radio"/> OVERNIGHT TRIP | DEPARTURE TIME | RETURN TIME | |
| <input type="radio"/> STUDENT ACTIVITY | | | | | |
| TRIP DESCRIPTION AND PURPOSE | | | | | |
| NAME OF THIS TRIP (LIMIT 250 CHARACTERS) | | | | | |
| WHAT IS THE PURPOSE OF THIS TRIP? | | | | | |
| PARTICIPANTS | | | | | |
| STUDENTS | | CHAPERONES | | | |
| MINIMUM NUMBER | MAXIMUM NUMBER | AVERAGE NUMBER | TEACHERS | ADMIN STAFF | VOLUNTEERS |
| | | 0 | | | |
| <small>All "Adult Volunteers (Not Employed)" must comply with school volunteer and mandated reporting policies, and must be cleared by the school Business Office.</small> | | | | | |
| SUBSTITUTE TEACHERS NEEDED? | | NUMBER OF SUBSTITUTES NEEDED | NUMBER OF DAYS | | |
| <input type="radio"/> YES <input type="radio"/> NO | | | | | |
| CURRICULUM STANDARDS | | | | | |
| LIST THE CURRICULUM STANDARDS THAT SUPPORT THIS TRIP | | | | | |
| <input checked="" type="checkbox"/> CLICK HERE TO ADD A STANDARD | | | | | |
| ACTIVITIES >> | | | | | |
| COMMENTS | | | | | |
| <input type="text"/> | | | | | |
| <input checked="" type="checkbox"/> CLICK HERE TO ADD A COMMENT | | | | | |
| EXPENSE | INCLUDE IN TRIP COST | SELF-PAY | AGENCY PKG | FUNDRAISER | |
| SUBSTITUTES | \$0.00 | | | | |
| ACTIVITIES | \$0.00 | | | | |
| TRANSPORTATION | \$0.00 | | | | |
| MEALS | \$0.00 | | | | |
| LODGING | \$0.00 | | | | |
| INCIDENTALS | \$0.00 | | | | |
| TOTAL TRIP COST | \$0.00 | | | | |
| COST PER STUDENT | NaN | | | | |

CLICK TO SUBMIT REQUEST

SUBMIT REQUEST

Field Trip Form: Details Tab

A: Trip Type – select either “Instructional” or Student Activity.

- “Sports” is no longer used – The Athletic Director has a different process

B: Trip Length – select between “Day Trip” or “Overnight Trip”

C: Departure/Return - Enter the trip dates and start/end times.

D & E: Trip Description:

- Name – Enter location of the trip
- Purpose – Add a brief description

F: Participants

- Students – enter the min. and max. number of students that may go on the trip
- Chaperons – enter the number of chaperones by teacher, admin staff, and volunteers.

G: Substitutes – Enter if substitutes will be needed and how many (the use of substitutes increases the per student cost).

H: Curriculum Standards – for Instructional trips enter the curriculum standard pertaining to the trip.

J: Comment: Enter the destination address into the comments section.

K – Do Not Enter – the form calculates the price.

- The Trip and Per Student Costs are NOT final until the Field Trip Coordinator adds the transportation price.

Do not click “submit” yet

- For Day Tips – you must complete the “Activities” tab before submitting
- For Overnight Trips – you must complete the “Activities”, “Meals”, and “Lodging” tabs before submitting
- If you submit before entering all necessary information you may have to re-enter the request again.

TRIP REQUEST

cworley_20191002120437

| | | |
|--|---------------------------|--|
| REQUEST SUBMITTED BY Christopher Worley | SCHOOL Business Office | REQUESTED BY JOB ROLE Human Resources Manager |
|--|---------------------------|--|

| | | | | |
|---------|-------------------|-----|-------|---------|
| DETAILS | ACTIVITIES | BUS | MEALS | LODGING |
|---------|-------------------|-----|-------|---------|

| ACTIVITY DESCRIPTION A | DATE B | STUDENT C | ADULT | ACTIVITY COST D |
|---|--|---|--|------------------------|
| <input type="text"/> SELECT HOW THIS ACTIVITY WILL BE FUNDED. Select funding source... ADD DOCUMENTATION <input type="button" value="Click here to attach a file"/> | ARRIVAL TIME <input type="text"/> DEPARTURE TIME <input type="text"/> | COST/ STUDENT <input type="text"/> # TICKETS NEEDED <input type="text"/> | COST/ADULT <input type="text"/> # TICKETS NEEDED <input type="text"/> | \$0.00 |

CLICK HERE TO ADD AN ACTIVITY

BUS >>

COMMENTS

CLICK HERE TO ADD A COMMENT

| EXPENSE | INCLUDE IN TRIP COST | SELF-PAY | AGENCY PKG | FUNDRAISER |
|-------------------------|----------------------|----------|------------|------------|
| SUBSTITUTES | \$0.00 | | | |
| ACTIVITIES | \$0.00 | | | |
| TRANSPORTATION | \$0.00 | | | |
| MEALS | \$0.00 | | | |
| LODGING | \$0.00 | | | |
| INCIDENTALS | \$0.00 | | | |
| TOTAL TRIP COST | \$0.00 | | | |
| COST PER STUDENT | NaN | | | |

CLICK TO SUBMIT A NEW REQUEST

SUBMIT REQUEST

Field Trip Form: Activities Tab

A: Activity Description

- Enter Activity/Destination Name in the blank field
- Select the funding type (eg student pay, fund raiser, etc.)
- Add Document that shows Activity/Destination admittance price
 - This can be a quote or flyer from the company, a print out from the company's website...

B: Enter the Date and Arrival/Departure time for the activity

C: Admittance Cost

- Enter the cost for admittance for both student and adult

D: The Total admittance cost will calculate here.

E: If the trip includes multiple activities, you will need to enter each activity separately.

- The Trip and Per Student Costs are NOT final until the Field Trip Coordinator adds the transportation price.

Do not click "submit" yet

- For Day Tips – you must complete the Bus tab before submitting
- For Overnight Trips – you must complete the "Activities", "Bus", "Meals", and "Lodging" tabs before submitting
- If you submit before entering all necessary information you may have to re-enter the request again.

TRIP REQUEST

cworley_20191016102850

| REQUEST SUBMITTED BY | SCHOOL | REQUESTED BY JOB ROLE |
|----------------------|-----------------|-------------------------|
| Christopher Worley | Business Office | Human Resources Manager |

| DETAILS | ACTIVITIES | BUS | MEALS | LODGING |
|---------|------------|------------|-------|---------|
|---------|------------|------------|-------|---------|

TRANSPORTATION DETAILS

| SELECT OR ENTER THE TRANSPORTATION COMPANY | CONTACT PERSON | PHONE NUMBER | FAX NUMBER |
|--|----------------|--------------|------------|
| Select or type... ▼ | | | |

| | |
|----------------------|--|
| TOTAL BUS QUOTE | |
| PARKING TOTAL | |
| ATTACH THE BUS QUOTE | <input type="button" value="Click here to attach a file"/> |

When reserving a bus, verify if there are additional expenses.

- Examples:
- Venue parking expenses
 - For overnight trips, verify if lodging expenses are included
 - Verify mileage overage cost
 - Verify cost for time delays

MEALS >>

COMMENTS

[CLICK HERE TO ADD A COMMENT](#)

| EXPENSE | INCLUDE IN TRIP COST | SELF-PAY | AGENCY PKG | FUNDRAISER |
|-------------------------|----------------------|----------|------------|------------|
| SUBSTITUTES | \$0.00 | | | |
| ACTIVITIES | \$0.00 | | | |
| TRANSPORTATION | \$0.00 | | | |
| MEALS | \$0.00 | | | |
| LODGING | \$0.00 | | | |
| INCIDENTALS | \$0.00 | | | |
| TOTAL TRIP COST | \$0.00 | | | |
| COST PER STUDENT | NaN | | | |

CLICK TO SUBMIT A NEW REQUEST

Field Trip Form: Bus Tab

Parking fees: The only information you need to enter on this tab is the fee for bus parking.

- The Field Trip Coordinator will calculate how many buses will be needed and the total parking fee.

Click here to “submit” for Day Trips

- For Overnight Trips complete the Meals and Lodging tabs.

Overnight Trips

- Contact the Business Office if you are planning an overnight trip.
- Because a lot of school overnight trips include all inclusive packages, overnight trips are entered differently based on the situation.
- Contact information:
 - Haneefah Banks – hbanks@hapevillecharter.org
 - Carla Olsen - colsen@hapevillecharter.org
 - Charlene Bussey - cbussey@hapevillecharter.org