

Transportation Trip Request Form

Before you start this request please look for availability on the district website, under Transportation, bus availability.

Departure Location: The location where you will be starting your trip

Departure Date: The date your trip starts

Departure Time: The time you will depart from your departure location

Return Date: The date you will return to your departure location

Return Start Time: The time you will leave to return to your departure location

Check if Overnight: Check this box if the trip is a trip that requires an overnight stay

Return Arrival Time: The time you will arrive back at your departure location

Number Nights: If an overnight trip, the number of nights you will be staying

Estimated Hours: This is filled in by you as an estimate of the number of hours your trip will take

of Passengers: Number of students, teachers, and chaperons that will be riding the bus

Grade / Class / Group: What grade of the students, their class or group that will be taking the trip

Requestor: Name of person filling out trip request form

Cell Phone: Requestors contact number **(this must be filled out)**

Email: Requestors email address

Check here for Charter Bus: Check box if you are requesting a charter bus

of Buses: The number of buses needed for the trip

Trip Purpose: **(check only one)**

Competition

Recognition

Curriculum Related

Other

Primary Destination: Where you will be going on your trip

Event / Reason: The reason for your trip

Special Instructions: Any instructions that the transportation department will need to make the trip a success. For example: if special accommodations are needed like a wheelchair or you want to include a restroom break. Also, please include what route you want to take for the trip

Budget Code: Account code used to expense trip

Destination #1 - #10: Trip route in order of destination (filling out required information)

❖ **Submit file to secretary via e-mail attachment when form is complete.**

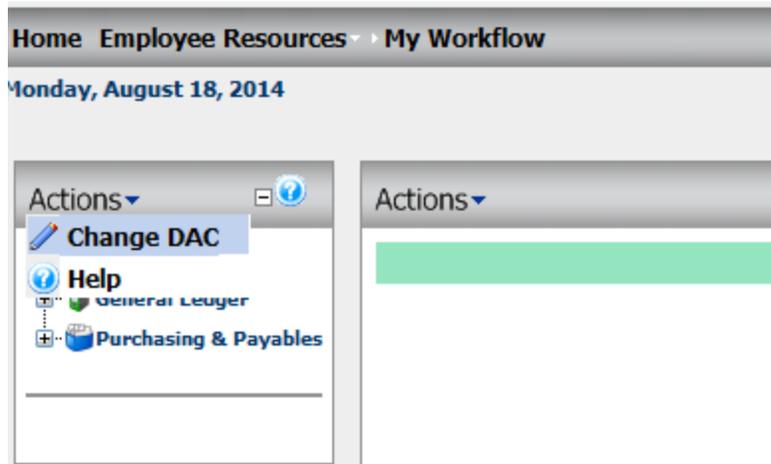
Procedure for Trip Request

- ❖ The school secretary will enter the appropriate accounting information and then forward it to the school Principal.
- ❖ The principal may approve or disapprove the request. If disapproved, the form will be returned to the requestor citing the reasoning for the disapproval. If approved, the form is automatically forwarded to the District office for final review.
- ❖ Once approved the information is submitted to iVisions where a purchase order is generated and the funds are encumbered for the trip.
- ❖ The trip request form is automatically forwarded to the Transportation Department for scheduling.
- ❖ The Transportation Department will either approve or disapprove the purchase order in iVisions.
- ❖ If Transportation Department cannot schedule the requested trip, the trip request will be disapproved and an email will be sent to the requestor with the reason why and possible options for the requestor to consider to have the trip scheduled by the Transportation Department.
- ❖ If a charter bus or different district school bus is needed to schedule the trip the requestor needs to delete the current purchase order in iVisions and reissue a new purchase order to the correct vendor in the school DAC not the 400A DAC.
- ❖ If a charter bus is specifically requested (please note in special instructions in the trip request) or a charter bus must be used because no yellow buses are available on the trip calendar, but a request was submitted anyway, the same procedures will apply. The school will be liable for the entire cost of the trip.

iVisions

Workflow Instructions

1. Teacher / Requestor will complete the Excel Transportation Request Form
2. Requestor will submit the form to the secretary at each site via e-mail.
3. Secretary will log into iVisions and use Actions - Change DAC to switch to 400A transportation.



Group: Redmond_FY1415 FY: 2015 DAC: 400A - Trip Requests

Please select a DAC:

400 - Transportation
400A - Trip Requests

Make sure that when you are selecting a vendor it is **always** RSD Transportation. If a change needs to be made Transportation will edit the purchase requisition.

Requisition Information	Proposed Vendor
Req. Number:	<input type="text"/>
Req. Date:	8/18/2014 <input type="text"/>
Vendor:	RSD TRANSPORTATION <input type="text"/>
DAC:	400A - Trip Requests <input type="text"/>
Ship To:	400 Transportation Department <input type="text"/>
Requester:	Toni Selk <input type="text"/>
PO Notes:	<input type="text"/>
Buyer:	<input type="text"/>

- Enter Who/What/Where/When/Why in the Description box of the trip requisition for the approver to review. (Secretary will need to make sure they enter enough information that would allow any user to review and approve)

Req. Number:

Description:

- ❖ Enter the estimated amount – see trip request expense details

Part Number:

Unit:

Unit Price:

Item Total:

- ❖ Assign budget code for the trip being taken

Qty	Account	Ext. Price	Tax	Freight	Line Total
1.00	101.2559.0332.375.000.000.000	\$215.00	\$0.00	\$0.00	\$215.00
1.00		\$215.00	\$0.00	\$0.00	\$215.00

Hold Account Distribution

This is what your screen should look like after completing step four.

Req. Number:

Description:

Part Number:

Unit:

Unit Price:

Item Total:

Qty	Account	Ext. Price	Tax	Freight	Line Total
1.00	101.2559.0332.375.000.000.000	\$215.00	\$0.00	\$0.00	\$215.00
1.00		\$215.00	\$0.00	\$0.00	\$215.00

- From the previous screen click **save** and then **close**. You will then see the screen below, where you will attach the Excel Document to the requisition to ensure Transportation has all the required information.

Requisition Information Proposed Vendor

Req. Number:

Req. Date:

Vendor:

DAC:

Ship To:

Requester:

PO Notes:

Buyer:

W9 Received

Order Via:

Project:

Date Required:

Order Type:

Reference:

Award #:

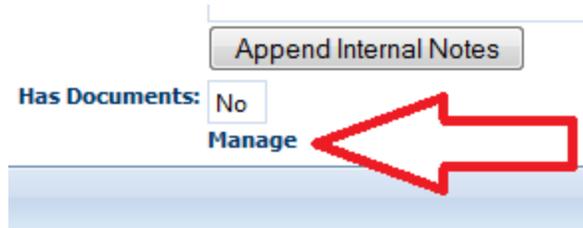
Internal Notes:

Append Internal Notes

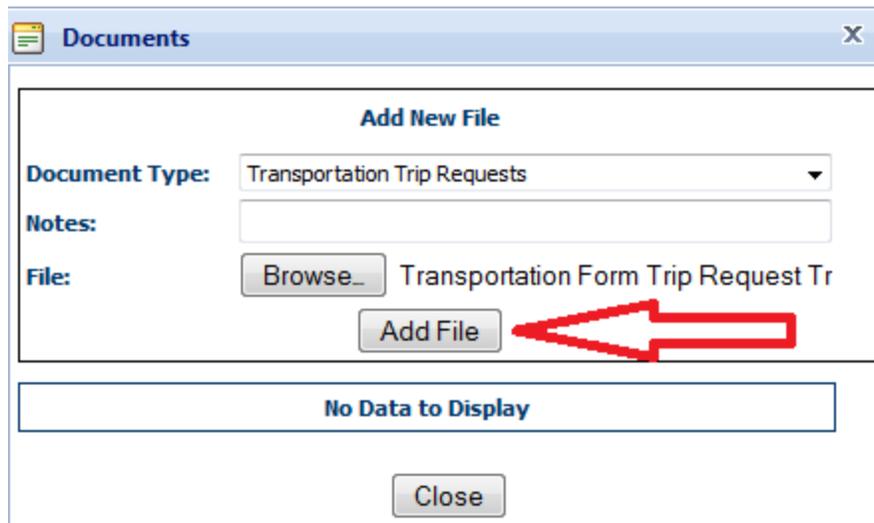
Has Documents: Manage

Description	Part No.	Unit	Unit Price	Qty.	Ext. Price	Tax
Ridgeview Grade 10 - Angella LaFontaine - OMSI Science Fair - Portland - 9/18/2014 - Curriculum Field Trip		EA	215.0000	1	\$215.00	\$

To attach transportation trip request form click **Manage**



Make sure document type selected is Transportation Trip Request. Click **Browse** and double click the trip request file that you saved earlier when you completed the form. Then click **Add File** to attach the Transportation Trip Request to the Purchase Requisition.

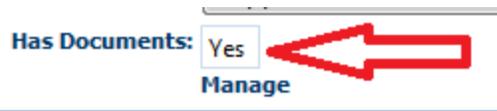


Once you click **Add File** the following will appear below the documents box on your screen. If you click the magnify glass to the left of the document type it allows you to open and view your document. Then click **close**.

	Document Type	Date	Notes	
	Transportation Trip Requests	08/18/14		×

Close

You will then see on your screen that the Has Documents box has changed from **No** to a **Yes**.



6. You will then approve the requisition and it will flow through the proper approval chain
7. Transportation will receive the fully approved requisition and schedule the trip
8. Transportation will review the fully approved trip request, make changes if necessary (Charter Bus / Date Change etc.), schedule the trip and approve requisition.
 - ❖ **(Two weeks prior to departure date, student roster, itinerary, and any motel information for overnight trips must be received)**
9. Accounts Payable creates Purchase Order from Requisition.

How will this benefit you?

- ❖ Approvals will happen electronically via iVisions with e-mail alerts like regular requisitions – Approval and scheduling time should be greatly decreased!
- ❖ Excel form will automatically calculate the estimated cost based on trip data entered and factor in Curriculum discount on qualifying trips
- ❖ Users are already familiar with entering requisitions on iVisions
- ❖ Funds are encumbered against the accounts as soon as the requisition is entered to ensure more accurate budget data
- ❖ Transportation will have all required data to schedule the trip