Instructions for Completing the Local Professional Leave (PL) Form for Texas

This form should be completed and entered into TEAMS PRIOR to the employee taking the trip.

Note that the amounts shown are ESTIMATES. Actual dollar amounts are calculated using the actual dates and times on the PL Reimbursement form.

Click on the "Fill In Sheet" tab to make sure you're on that sheet. ALL data entry is done here. You can't enter anything on the first tab "Local Form-PRINT THIS."

Complete information only in the highlighted cells. Other cells are locked. You can't enter anything.

In cell B5, Enter the non-federal budget code you're going to be using.

> If you will be using two non-federal budget codes, enter the second budget code in cell B7. If a second code won't be used, leave this cell blank.

In cell B13, enter the last name of the employee who is being reimbursed for travel expenses.

In cell B15, enter the last name of the employee who is being reimbursed for travel expenses.

In cell B17, enter the position title for the employee who is being reimbursed for travel expenses.

In cell B19, enter the 3 digit organization code employee who is being reimbursed for travel expenses.

In cell B21, enter the campus/department name for employee who is being reimbursed for travel expenses.

In cell B23, enter the Employee ID for the employee who is being reimbursed for travel expenses.

In cell B25, enter the Employee Advance Reimbursement (EAR) number for employee who is being reimbursed for travel expenses, if it is known.

In cell B27, enter the ESTIMATED DATE the employee who is being reimbursed for travel expenses will LEAVE FOR THE EVENT using the format shown on the PL Form.

In cell B29, enter the ESTIMATED DATE the employee who is being reimbursed for travel expenses will RETURN FROM THE EVENT using the format shown on the PL Form.

In cell B31, enter the ESTIMATED TIME the employee who is being reimbursed for travel expenses will LEAVE FOR THE EVENT using the format shown on the PL Form.

In cell B33, enter the ESTIMATED TIME the employee who is being reimbursed for travel expenses will RETURN FROM THE EVENT using the format shown on the PL Form.

In cell B35, click in the cell and select **Y** if the employee who is being reimbursed for travel expenses WILL spend the night out of town. Select **N** if the employee who is being reimbursed for travel expenses will NOT spend the night out of town.

In cell B37, click in the cell and select **Y** if the employee who is being reimbursed for travel expenses WILL drive a KISD owned vehicle. Select **N** if the employee who is being reimbursed for travel expenses will NOT drive a KISD owned vehicle.

In cell B39, click in the cell and select **Y** if the employee who is being reimbursed for travel expenses WILL drive a personal vehicle. Select **N** if the employee who is being reimbursed for travel expenses will NOT drive a personal vehicle.

In cell B41, if N was selected in regards to both of the vehicles, list the name of the employee who will be driving a vehicle.

In cell B43, if the employee who is being reimbursed for travel expenses is driving a vehicle, list the other passenger(s). If no other passengers, list NONE.

In cell B50, click in the cell and select **Y** if the lodging for the employee who is being reimbursed for travel expenses WAS/WILL BE PRE-PAID BY KISD (check request to hotel, KISD credit card, PO for travel agency, etc). Select **N** if KISD DID NOT/WILL PAY for the Lodging.

In cell B52, if **Y** was selected above, list the CR number or if paying by KISD credit card, type "KISD CC"

In cell B54, click in the cell and select **Y** if the employee who is being reimbursed for travel expenses WILL SHARE A ROOM WITH ANYONE ELSE. Select **N** if the employee who is being reimbursed for travel expenses will NOT SHARE A ROOM WITH ANYONE ELSE.

In cell B56, if **Y** was selected above, list the name(s) of the individual(s) that will share the room with the employee to be reimbursed.

In cell B61, click in the cell and select **Y** if the registration for the employee who is being reimbursed for travel expenses WAS/WILL BE PRE-PAID BY KISD (check request to hotel, KISD credit card, PO, etc). Select **N** if KISD DID NOT/WILL PAY for the Lodging.

In cell B63, if **Y** was selected above, list the CR number or if paying by KISD credit card, type "KISD CC"

In cell B69, list the Title of the Workshop/Conference/Event that the employee who is being reimbursed for travel expenses will attend.

In cell B71, click in the cell and then use the arrow to open a drop down box. This box lists all the cities/counties in Texas as well as certain dates for some. Select the correct city/county along with the correct date (if that is an option). If the city/county is not listed by name choose NOT LISTED.

In cell B73, if you chose "NOT LISTED" above, type in the name of the city where the event was held.

In cell B78, type any comments relevant to this travel—such as "Pay only $200 in total."

In cell B86, click in the cell and select **Y** if there is an overall maximum amount your organization wants paid using budget code 1. Select **N** if there is not an overall maximum amount your organization wants paid using budget code 1. *(NOTE—If you want all the per diem rates, lodging, mileage, etc. paid as calculated on the form, you will select N here. If you want to limit the amount paid to be less than the amount shown as able to be reimbursed, you will select Y.)*

In cell B88, if **Y** was selected above, type in the maximum amount to be reimbursed using budget code 1. If N was selected, leave this cell blank.
ONLY COMPLETE CELLS B90 AND B92 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

> In cell B90, click in the cell and select **Y** if there is an overall maximum amount your organization wants paid using budget code 2. Select **N** if there is not an overall maximum amount your organization wants paid using budget code 2. *(NOTE—If you want all the per diem rates, lodging, mileage, etc. paid as calculated on the form, you will select N here. If you want to limit the amount paid to be less than the amount shown as able to be reimbursed, you will select Y.)*

> In cell B92, if **Y** was selected above, type in the maximum amount to be reimbursed using budget code 2. If N was selected, leave this cell blank.

In cell B96, enter the number of round-trip miles to be reimbursed using budget code 1 as computed on the Google Map website. Be sure to save and attach a copy of the Google Map. If none, leave blank.

ONLY COMPLETE CELL B98 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

> In cell B98, enter the number of round-trip miles to be reimbursed using budget code 2 as computed on the Google Map website. Be sure to save and attach a copy of the Google Map. If none, leave blank.

In cell B100, enter the amount of the ESTIMATED registration fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

ONLY COMPLETE CELL B102 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

> In cell B102, enter the amount of the ESTIMATED registration fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

In cell B104, enter the amount of the ESTIMATED parking fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

ONLY COMPLETE CELL B106 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

> In cell B106, enter the amount of the ESTIMATED parking fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

In cell B108, enter the amount of the ESTIMATED taxi fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

ONLY COMPLETE CELL B110 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

In cell B110, enter the amount of the ESTIMATED taxi fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

In cell B112, enter the amount of the ESTIMATED rental car fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

ONLY COMPLETE CELL B114 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

In cell B114, enter the amount of the ESTIMATED rental car fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

In cell B116, enter the amount of the ESTIMATED internet/WFfi fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

ONLY COMPLETE CELL B118 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

In cell B118, enter the amount of the ESTIMATED internet/WiFi fee that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

In cell B120, enter the amount of the ESTIMATED other travel expenses not listed above (NOT including books, supplies, membership fees) that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

ONLY COMPLETE CELL B122 IF YOU LISTED A SECOND BUDGET CODE ABOVE IN CELL B7.

In cell B122, enter the amount of the ESTIMATED other travel expenses not listed above (NOT including books, supplies, membership fees) that will be paid to the employee who is being reimbursed for travel expenses. If none, leave blank.

In cell B129, click in the cell and select **Y** if only 1 budget code will be used to reimburse ESTIMATED lodging/meal expenses. *(If you did not list a second budget code in Cell B7, you will need to select Y here OR go to cell B7 and add a second budget code.)* If you listed a second budget code in cell B7, and you want lodging/meals to be paid from more than one budget code, select **N** here.

In cell B131, if you selected N above, enter the maximum amount you want to come from budget code 1 for lodging. If you selected Y above, leave this cell blank.

In cell B133, if you selected N above, enter the maximum amount you want to come from budget code 1 for meals. If you selected Y above, leave this cell blank.

The instructions for rows 138 through 377 are the same. The only difference is in the day (day 1 of the trip versus day 10 of the trip).

Enter the employee's ESTIMATED hotel room charge WITHOUT TAX to be charged using budget code 1.

Enter the employee's ESTIMATED hotel room charge WITHOUT TAX to be charged using budget code 2, if any. If none, leave blank.

Enter the employee's ESTIMATED hotel room TAX to be charged using budget code 1.

Enter the employee's ESTIMATED hotel room TAX to be charged using budget code 2, if any. If none, leave blank.

Enter the number of breakfasts included in registration for day 1 that will be calculated using budget code 1.
Enter the number of breakfasts included in registration for day 1 that will be calculated using budget code 2, if any. If none, leave blank.

Enter the number of lunches included in registration for day 1 that will be calculated using budget code 1.

Enter the number of lunches included in registration for day 1 that will be calculated using budget code 2, if any. If none, leave blank.

Enter the number of dinners included in registration for day 1 that will be calculated using budget code 1.

Enter the number of dinners included in registration for day 1 that will be calculated using budget code 2, if any. If none, leave blank.

Save your file to your computer.

Click on the blue tab "Local Form-Print THIS."

All data should be shown and calculations done on this page for you. This is the form that will be attached in TEAMS. You can attach the Excel file itself, or you can print out the blue tabbed page and attach that to the EAR in TEAMS.