

**Brunswick Central
School District
Purchasing
Handbook
for Employee Use**

Contents

Purpose	3
Objectives of School Purchasing	3
Who's Responsible?	4
Procedures for District Purchasing	5
Blanket Purchase Orders	7
Budget Transfers	8
Fixed Assets	8
Employee Procedures for Submitting a Claim for Expense Reimbursement ...	9
Boxtops for Education and Other Promotional Programs.....	12
Referee/Sports Official Reimbursement	12
Procedures for Professional Service Contracts.....	13
Frequently Asked Questions.....	14
When does a purchase need to go through a formal competitive bidding process?.....	14
What is the difference between a public works contract and a purchase contract?	14
What if a purchase contains both labor and equipment?	14
Does the district have to award the contract to the lowest bidder?.....	14
What if the district wants to lease equipment?	14
What if the materials being purchased are second-hand or surplus from another government agency and it exceeds the monetary threshold?..	14
What if the purchase exceeds the monetary threshold, but is only offered by one vendor?	15
What is the proper way to document a quote?	15
How many price quotes should be obtained?	15
When do I need to issue an RFP (Request for Proposals)?.....	15
What if an emergency purchase is required?.....	15
Can a district employee be considered for a professional services contract?.....	16
What is the difference between purchasing and procurement?.....	16
Are there any restrictions on what can and can't be purchased by a school district?	16
What should I do if I want to be reimbursed for expenses from a conference or other district-related event?	16
What if the purchase we need is different than the amount quoted on the purchase order?	16
Appendix 1 - Quote Requirement Reference	17
Appendix 2 - Quote Record Form.....	18
Appendix 3 - Conference Request Form	19
Appendix 4 - Claim Form.....	20
Appendix 5 - Mileage Memorandum	21
Appendix 6 - Request for Check	22
Appendix 7 - Mileage Reimbursement	23

Purpose

The intent of this manual is to provide a plain language guide for any type of district purchase. The procedures and policies in this manual can be referenced in Section 6000 of Brunswick Central School Board of Education District Policies.

This manual will guide the district employee in the proper procedures to purchase:

- the correct item
- at the price that is most cost-effective
- while meeting all legal and internal control requirements

Objectives of School Purchasing

- Effectively supply materials, supplies and contracted services
- Goods are purchased at the lowest possible price and consistent with quality standards
- Purchases are consistent with educational goals and fall within budget framework
- Purchases follow accounting and reporting standards and are accurately documented

Who's Responsible?

Board of Education	<ul style="list-style-type: none"> ▪ Adopts districts policies on procurement and reviews them annually. ▪ Awards contracts to the lowest responsible bidder. ▪ Appoints professional services providers annually.
Assistant Superintendent of Business	<ul style="list-style-type: none"> ▪ See Purchasing Agent
Purchasing Agent	<ul style="list-style-type: none"> ▪ Authorizes and records bids. ▪ Recommends contract awards to BOE. ▪ Administers all purchasing activities ▪ Ensures quality and quantity of purchases. ▪ Prepares all bid specifications and statement of general bidding conditions ▪ Clarifies any questions on bid specifications. ▪ Signs/Approves purchase orders. ▪ Establishes and implements standard forms for purchasing. ▪ Establishes administrative procedures for requests for proposals. ▪ Makes recommendations to the BOE for professional services.
Accounts Payable Clerk	<ul style="list-style-type: none"> ▪ Acts as liaison between purchasing agent and requesting employee. ▪ Checks claims for correctness and appropriateness. ▪ Prepares for payment. ▪ Authorizes payment.
Treasurer	<ul style="list-style-type: none"> ▪ Signs checks for payment.
Claims Auditor	<ul style="list-style-type: none"> ▪ Approves invoices for payment upon meeting documentation requirements.
Employee	<ul style="list-style-type: none"> ▪ Initiates purchase or claim decision.
Heads of Departments	<ul style="list-style-type: none"> ▪ Approves purchase or claim decision.

Procedures for District Purchasing

When a purchase is necessary, the following steps are used to obtain materials, equipment or supplies for district use using district funds:

1. Initiation of Purchasing Decision

Purchases over a certain dollar amount require verbal and/or written quotes, and in some cases, competitive bidding. Please refer to Appendix 1 to check the requirements.

2. Building Level Approval

An employee wishing to make a district purchase must have the approval of the building principal or department supervisor to do so. Teachers need to write a paper purchase order which is to be given to the building secretary. A purchase order can be filled out on the district's purchasing software by the building secretary; however all purchase orders must have the approval (via district software) of the department/building supervisor. It will be the responsibility of the department or building to use the correct budget code and to ensure adequate funds are available.

3. Purchasing Agent

Once the purchase order is completed on the software, it is reviewed and approved or disapproved by the Purchasing Agent via district software.

4. Accounts Payable

Approved purchase orders with electronic signature of the Purchasing Agent are printed as follows:

- Vendor Copy - sent to vendor/payee

- Accounts Payable Copy - filed in AP office, waiting for proof of receipt/invoice

- Receiving Copy - sent to Central Receiving (if tangible item) or to employee supervising performance of service.

5. Receipt of Goods and Services

Central Receiving (or Transportation Supervisor in the case of Transportation Department deliveries) collects packing slip or receipt, attaches the color copy of the purchase order signed by Central Receiving or the employee receiving the goods or service and sends both the purchase order and packing slip or receipt back to the Accounts Payable Clerk. If physical item is priced \$1000 or more, it becomes a fixed asset of the district and must be included in district inventory which is done by the Central Receiving Department. See "Fixed Assets" for more information. If item or service is intangible, proof of services or delivery must be sent to the Accounts Payable Clerk with the re-

ceiving copy of the purchase order signed by Central Receiving or the receiving employee.

Procedure for reporting shortages or damages in receipt of goods can be found on page 7.

6. Claims Auditor

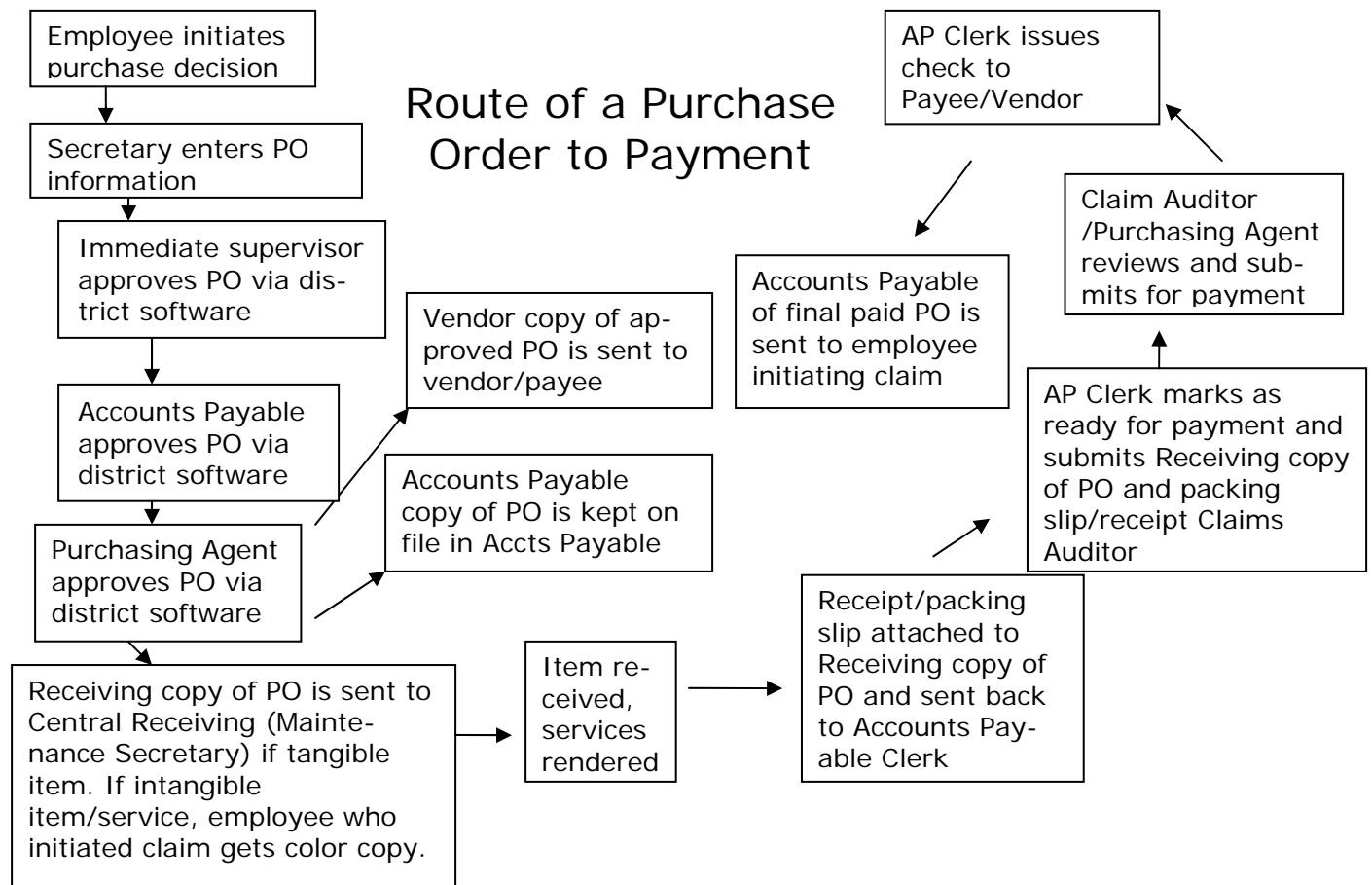
Internal Claims Auditor approves purchase order and check for payment and check is issued to vendor.

7. Filing

The Accounts Payable Clerk files the current fiscal year purchase orders in their office. Each payment must include the colored copy of the purchase order, invoice and proof of receipt of goods or delivery of service and the check stub.

8. Initiating Employee/Department Notification

A copy of the final purchase order is sent back to the requesting employee/department depicting the final amount paid to the vendor so they can keep a running total of money.



Procedure for Reporting Shortages or Damages

If any shortage is discovered or damage to a package is visible, the receiver (Central Receiving) should note the details on the delivery receipt and on the driver's copy (if applicable). If the container appears damaged, the receiver should insist that it be opened before accepting delivery. Any concealed damage should be noted by the receiver and the driver. If the container is even slightly damaged, it should be noted on the delivery receipt. The driver should not be given a clear delivery receipt (one signed without exception) if there is the slightest crush, crease, scuff or puncture on any container. Any bruised or damaged conditions should be noted on both copies of the delivery receipt.

For purposes of inspection, merchandise should be left within the damaged container. The container should NOT be destroyed. The receiver should notify the business office immediately. The business office will then notify the company and advise the requesting employee on the process of returning the item(s). Returns should NOT be made without the business office's prior knowledge. Once returned, a copy of the proof of pickup from UPS, FedEx or freight carrier is to be sent to the business office. A copy of the purchase order is to be retained by the requesting employee and central receiving until a replacement has been received.

Blanket (Open) Purchase Orders

In some cases, it is appropriate for the district to keep a purchase order "open" for all or part of a school year to accommodate multiple purchases of the same kind. Several factors should be present before considering a blanket purchase order:

- Purchases are made from one vendor
- Purchases are recurring, possibly daily
- Purchases are in the same general category (e.g. plumbing, electrical supplies for Operations and Maintenance, perishable items for culinary arts, etc)
- There is difficult in ascertaining needs in advance
- Items are generally needed immediately in order to ensure continuance of service.

Open purchase orders should not be a substitution for planning and must be issued for a specific dollar limit based on information from the records covering the previous fiscal year or form data obtained from the employee involved. It should be understood that the limit does not have to be reached. Separate purchase orders for each vendor are used. When items are delivered or picked up, itemized receipts or other documentation received from the vendor should be signed by the individual receiving the item(s) and then

forwarded to the Accounts Payable Clerk for approval. If the amount allowed on the purchase order is reached prior to the end of the time needed, a new purchase order must be requested.

Blanket orders are NOT to be used for the purchase of equipment or for specific items that can be purchased using the normal procedure.

Budget Transfers

In the event a small budget transfer needs to be made, the information should be emailed to the Accounts Payable Clerk or the Assistant Superintendent of Business. Transfer requests need to include budget codes and descriptions for transfer in and transfer out and the reason why transfer is needed. Upon approval, the Assistant Superintendent of Business will send notice to the Accounts Payable Clerk who will move the funds between budget codes using the district's software. A copy of the email approving the transfer is kept on file. Budget transfers in excess of \$10,000 need approval from the Board of Education.

Fixed Assets

Any equipment or supply purchase made by the district in which the individual value of an item exceeds \$1000 must be included in the fixed asset inventory of the district. Central Receiving is responsible for ensuring that the item's information is logged into the district's software and that the item is tagged appropriately.

Repairs for A/V and IT Equipment

When audio-visual or informational technology equipment are damaged and require repair, an AV Repair/Replacement Request Form must be used. Contact the high school principal's office for a copy of this form. The equipment must then be brought to the Business Office and a repair tag is attached to equipment. Servicing vendor picks up equipment from the Business Office.

Employee Procedures for Submitting a Claim for Expense Reimbursement

A **Claim Form** should be used for the following items and the form should specifically identify the activity and reason for reimbursement as well as the date of activity.

- ***Reimbursement of work boots and uniforms***, according to the CSEA contract. Requests for reimbursements for uniforms or work boots must be made by October 15th of the current school year.
- ***Reimbursement of travel expenses related to courses, conferences and workshops and expenses.***
 - Daily travel out of district for employees that are not normally scheduled out of district will receive meal reimbursements in accordance with breakfast, lunch and dinner allowances at the federal (GSA) maximum meal and incidental expenses (M&IE) per diem rates in effect for the travel destination location. These rates can be found at www.gsa.gov.
 - An employee traveling with ***at least one overnight stay*** is subject to the following:
 - Breakfast, lunch and dinner allowance rates will be set annually at the Board of Education Reorganizational Meeting.
 - Actual and necessary lodging expenses will be paid provided, however, that lodging expenses that exceed maximum lodging rates established by the GSA for the applicable destination may be reimbursed when the conference, convention, workshop, meeting or training requires the employee to lodge at a particular location where the lodging costs exceed the applicable rate schedule or when lodging at applicable rates is not reasonably available.
 - Actual and necessary travel expenses (other than mileage), including but not limited to transportation fees, tolls, parking fees and taxis may be reimbursed if itemized original receipts are provided ¹.
 - Travel shall be by the most economical yet practicable method available, whether by private automobile, school vehicle or common carrier. If travel is by personal automobile, mileage shall be reimbursed in accordance with the mileage policy outlined in this section. Gasoline expenses and any other expenses related to use of a personal automobile will not be reimbursed.

¹ Please keep in mind that necessary travel, in most cases, does not cover the use of taxicabs.

- Rental vehicle charges may be incurred only when it can be demonstrated as the most practical or economical means of travel. In such instances, rental vehicles should be obtained through purchase order or school credit card, utilizing state contract when available. In situations where purchase orders will not be accepted and a school credit card is not used, rental vehicle expenses will be reimbursed only if itemized receipts are provided.
 - Air travel may be reimbursed only when it can be demonstrated as the most practical or economical means of travel. Every effort shall be made to obtain the most economical fares possible.
 - Employee's who attend conferences which include as part of the working agenda meals which are not included in the conference fees, may be reimbursed for such meal(s) upon prior approval and submission of appropriate documentation.
- **Other Reimbursements as deemed necessary** by the Director of School Business Operations. The purchase order process should be used whenever possible. However, in instances where purchase orders cannot be used, an employee may submit for approved expenses.

Please be aware of items that are **NOT** reimbursable:

- Additional classroom materials purchased without prior approval
- Gifts and awards that are not completely offset by donations to the district, etc.
- Sales tax, except in some cases²
- Alcoholic beverages as a part of meal expenses
- Hotel/lodging incidental charges (health club facilities, pay television, etc.)

A **Mileage Reimbursement Form** should be used for the following:

- The district Reimbursement for only Mileage
 - The district will reimburse employees for substantiated actual and necessary mileage incurred when personal vehicles are used for district-related travel.
 - Mileage is paid at the applicable Business Standard Mileage Rate as published periodically by the Internal Revenue Service and approved by the BOE.
 - The district will not reimburse employees for "commuting" miles on regular work days. Commuting Mileage is defined to mean mileage from home to or from the employee's primary work lo-

² Sales tax on meals in restaurants may be deemed to be an expense incidental to the meal and a necessary expenditure.

cation. See memorandum in Appendix 5 for a sample calculation.

- o Employees may be reimbursed for actual and necessary mileage between an employee's home and a location other than the employee's primary work location, when such travel is necessary to attend a meeting at night or on a non-work day.
- o The Business Standard Mileage Rate includes all fixed and operating costs of using the automobile for business such as fuel, insurance, maintenance, lease payments, etc. However, it does not include tolls and parking fees. Business-related tolls and parking fees are reimbursable and allowable expenses when properly documented.

Reasonable, necessary and actual out-of-pocket expenses incurred by employees for approved school district expenses or while traveling for school-related activities will be reimbursed. For these types of reimbursements, a Claim Form must be used, samples are shown in the Appendices.

The following criteria should be considered before attending conferences, conventions, workshops, meetings or training events:

- Benefit to the organization as a whole
- Benefit to an educational program
- Professional benefit to the individual, provided such benefit will advance the district's educational mission
- Reasonableness of cost of registration fees and other expenses required to attend
- Availability of other, less-costly options, including but not limited to other conferences or training events, opportunities for Brittonkill staff to serve as trainers of other staff, or other venues for holding meetings.
- An employee may be required to report on such conference, as a condition of approval.

Boxtops for Education and Other Promotional Programs

There are several organizations that have programs providing funds for schools. If a teacher or group of teachers chooses to participate in these programs they must obtain approval from administrator and Superintendent. Once the check is issued to the school, a purchase order for the supplies or equipment to be purchased with those monies must be created within 30 days.

Referee/Sports Official Reimbursement

While referees, umpires and other sports officials are not considered district employees, the process for compensation is similar to that of an employee. Officials will be paid according to the agreement in place between Section Two and The Officials Organization. It is the responsibility of the Athletic Director to obtain a copy of this agreement and pay according to the scale set forth by the agreement and administered by the NYSPHSAA. Claim forms are kept by the Athletic Director and provided to coaches for distribution to the sports official. The Athletic Director must provide the proper budget code, verify the amount requested by the sports official and approve the claim by signing the form and forwarding to Accounts Payable.

Requests for Checks

In special circumstances, monies for prepaid travel meals and expenses are provided to the employee using a Request for Check form. Please see the section on travel reimbursements for amounts and qualifying expenses. The use of this form should be discussed with your building administrator or supervisor during the approval process of your conference/course/workshop request.

Procedures for Professional Service Contracts

When the district needs to contract for professional services (architect, legal services, medical services, auditing, property appraisals, insurance or other specialty skills), competitive bidding and quotes are not used. Instead, the district will issue a Request for Proposals (RFP). The district will periodically, but not less frequently than every three years, issue professional services RFP.

To prepare an RFP for professional services, the Assistant Superintendent of Business will follow these steps:

1. Locate highly qualified professionals by reviewing trade journals; checking professional listings; and/or inquiring of other districts or appropriate sources. Send each a notice that the RFP will be posted on the district website under the "Bids/RFPs" section.
2. Prepare a comprehensive Request for Proposal including critical details of the services needed; inclusive of the structure of the relationship between provider and the district; terms of retainer (if applicable); hourly fees and other associated costs, which will be posted on the district website.
3. Thoroughly review the proposals for suitability of the provider for the district's needs; special knowledge or expertise; credentials and certifications; quality of service; available staff and cost. The review process may or may not include a personal interview.
4. The Superintendent in consultation of the Assistant Superintendent of Business will recommend the chosen professional service provider to the Board of Education.

Frequently Asked Questions

When does a purchase need to go through a formal competitive bidding process?

Any time a purchase will exceed \$20,000 for purchases or \$35,000 in public work contracts in a fiscal year, you must solicit a formal bid.

What is the difference between a public works contract and a purchase contract?

A public works contract involves services, labor or construction, whereas a purchase contract involves the acquiring of commodities, supplies, and/or equipment.

What if a purchase contains both labor and equipment?

The district can determine which part of the contract is predominant and use that dollar amount threshold to determine whether or not competitive bidding is required.

Does the district have to award the contract to the lowest bidder?

Not necessarily. However, proper documentation must be on file as to why the district did not use the lowest bidder and it must be in the best interest of the district. Also, the lowest bidder must have the opportunity to speak to the board to defend their product or service.

What if the district wants to lease equipment?

Leases are subject to the same cost-threshold as purchases. The district should have a cost/benefit analysis on file when making decisions to lease rather than purchase.

What if the materials being purchased are second-hand or surplus from another government agency and it exceeds the monetary threshold?

Keep documentation on market price comparisons of these items with verbal or written quotes and the name of the government entity.

What if the purchase exceeds the monetary threshold, but is only offered by one vendor?

Document the unique nature of the item or service to be purchased compared to other items that are available. Detail why other competitive methods are not adequate and/or cost-effective.

What is the proper way to document a quote?

Verbal quotes whether obtained over the phone or in person should be documented in a log including, at minimum, date, item or service, price quotes, name of vendor, name of vendor's agent/representative. Written quotes should be provided by the vendor and include, at minimum, the date, description of item or details of service, price quoted, name of contact. Quotes can be logged by using the "Quote Form" in Appendix 2.

How many price quotes should be obtained?

See Appendix 1 for a guide on how many quotes should be obtained for a specific dollar amount.

When do I need to issue an RFP (Request for Proposals)?

Requests for Proposals are used when the district seeks professional services (e.g. attorney, architect, etc) in excess of \$35,000. A number of area professionals should be contacted by checking trade journals, listings of professionals and making inquiries to other districts, so that they may submit proposals and be considered for the work. In addition to price, factors used in choosing the vendor can be special knowledge or expertise; quality; staffing; district suitability.

What if an emergency purchase is required?

The district shall not be subject to the competitive bidding process if an emergency occurs where:

1. the situation arise out of an accident or unforeseen occurrence or condition;
2. a district building, property, or the life, health, or safety of an individual on district property is affected; or
3. the situation requires immediate action which cannot await competitive bidding.

These situations do not preclude the district from choosing the lowest-cost provider whenever practical under the circumstances. Keep documentation on the reasons for selection.

Can a district employee be considered for a professional services contract?

No, according to district policy, selected professional service providers must not be considered employees of the district.

What is the difference between purchasing and procurement?

In general, procurement is the complete action or process of acquiring or obtaining labor or items through specific measures. Purchasing is less strategic and involves just the act of purchasing the goods.

Are there any restrictions on what can and can't be purchased by a school district?

School district employees have a duty to seek the maximum educational value for every dollar of district monies spent. There are certain guidelines for some materials:

- The New York State Office of General Services (OGS) has set guidelines for purchasing *environmentally-friendly or "green" cleaners*.
- Preference may be given to vendors of *instructional materials that provide the information in "alternative format" compatible with the learning needs of disabled students*.

What should I do if I want to be reimbursed for expenses from a conference or other district-related event?

An employee claim form (Appendix 4) should be filled out according to the steps outlined in the "Employee Procedures for Submitting a Claim for Expense Reimbursement" of this handbook.

What if the purchase amount is different than the amount quoted on the purchase order?

If an increase, decrease or change needs to be made to a purchase order, an email should be sent to the Purchasing Agent detailing the specific changes and the reason for the changes.

Appendix 1 - Quote Requirement Reference

	Verbal Quotes			Written Quotes		RFP	Other
	0	3	More Than 3	3	More Than 3		
Purchase Contracts up to \$20,000							
Under \$100	x						
\$100 - \$500		x					
\$501 - \$1,000			x				
\$1,001 - \$5,000				x			
\$5,001 - \$20,000					x		
Public Work Contracts Up To \$35,000							
Under \$1,000	x						
\$1,001 - \$5,000		x					
\$5,001 - \$10,000				x			
\$10,001 - \$35,000					x		
Emergencies							x
Insurance					x		
Professional Services						x	
Leases of Personal Property							x
Second-Hand Equipment from Other Governments							x
Certain Food & Milk Purchases							x
Sole Source (For example, patented or monopoly item)							x

Appendix 2 - Quote Record Forms

QUOTE FORM

Supplies, Materials ("Purchase") Contracts:

Required for items \$101 - \$500 3 Verbal Quotes or Catalogue Comparison	Items \$501 - \$1,000 >3 Verbal Quotes	Items \$1,001 - \$5,000 3 Written Quotes	Items \$5,001 - \$20,000 >3 Written Quotes
---	---	---	---

At its annual meeting the Board of Education appoints the Purchasing Agent who is the only person authorized to order or contract for purchases or services and to issue purchase orders without the Board's approval. The purchasing agent shall ensure the quality and quantity of the purchases made by the District.

The Brunswick School District is not responsible for payment of any goods or services that are not authorized by the purchasing agent.

Date: _____

DATE QUOTE EXPIRES	VENDOR NAME AND ADDRESS	NUMBERS	VENDOR REP NAME	ITEM	PRICE OF EACH INCLUDING SHIPPING
Quote 1		Phone			
		Fax			
Quote 2		Phone			
		Fax			
Quote 3		Phone			
		Fax			

Submit Quote Form with purchase order.

Revised 10/12/11 CRS

QUOTE FORM

Public Works Contracts:

Required for items \$1,001 - \$5,000 3 Verbal Quotes	Items \$5,001 - \$10,000 >3 Verbal Quotes	Items \$5,001 - \$10,000 3 Written Quotes	Items \$10,001 - \$35,000 >3 Written Quotes
---	--	--	--

At its annual meeting the Board of Education appoints the Purchasing Agent who is the only person authorized to order or contract for purchases or services and to issue purchase orders without the Board's approval. The purchasing agent shall ensure the quality and quantity of the purchases made by the District.

The Brunswick School District is not responsible for payment of any goods or services that are not authorized by the purchasing agent.

Date: _____

DATE QUOTE EXPIRES	VENDOR NAME AND ADDRESS	NUMBERS	VENDOR REP NAME	ITEM	PRICE OF EACH INCLUDING SHIPPING
Quote 1		Phone			
		Fax			
Quote 2		Phone			
		Fax			
Quote 3		Phone			
		Fax			

Submit Quote Form with purchase order.

Revised 10/12/11 CRS

Appendix 3 - Conference Request Form

Brunswick (Brittonkill) Central Schools Conference Request Form

1. **Do not** register before approval or district will not reimburse the registration fee.
2. After attending the conference, submit all original receipts with claim form for reimbursement.
3. Submit a copy of certificate of completion for in-service credit.
4. Submit a claim form for meal advance payment at least 3 weeks prior to the conference.

Participant's Name _____

Conference/Course Title _____

Location of Conference/Course _____

Date _____ Length of Conference _____ (hours)

Curriculum Application _____

Do you hold a Professional Teaching Certificate or Level III Teaching Assistant Certificate requiring 175/75 hours of professional development? Yes No

Is this conference outside of the school day? Yes No Both inside and outside of the school day

In-Service Credit Requests:

In-service Credit (outside of school day, prior approval and participant pays all registration fees). Attach a copy of the course description along with an explanation of how this course is related to your teaching and will benefit the district. After course is completed, submit certificate of completion to receive credit.

Total In-service hours requested _____

Estimated Conference Costs:

Substitute Requirements: No Yes (If yes, indicate the number of days) _____

Conference Registration Fee \$ _____

Private Vehicle/ Estimated Mileage (required for reimbursement) \$ _____

Other Transportation cost (receipt required) \$ _____

Tolls (receipt required) \$ _____

Lodging, meals and/or parking (receipt required) \$ _____

Total Estimated Expenses \$ _____

Participant's Signature _____ Date _____

For Review/Approval of Building Principal, Director of Curriculum and Assessments, and Superintendent

Building Principal _____ Date _____

Budget Code _____

Director of Curriculum and Assessments _____ Date _____

Superintendent _____ Date _____

Conference: Approved Denied Comments _____

In-Service Credit hours: Approved Total hours _____ Denied

Final Approval for In-Service Credits for payroll

Superintendent _____ Date _____

Copies to: Superintendent Business Office Building Administrator Employee

Appendix 5 - Mileage Memorandum

Brunswick Central School
District Office
Gail Lathrop
Director of Business Operations

Memorandum

To: All Staff
From: Gail Lathrop, Director of Business Operations
Date: December 3, 2009
Subject: Mileage Reimbursement



Recently, I have been asked to explain the reimbursement for mileage. I thought I would take this opportunity to go over some examples.

You are encouraged to travel using the most economic means possible. The district will pay for travel that has been approved on a conference request form. You may also be reimbursed for tolls and/or parking. If travel is on a normal work day you will be reimbursed for the mileage to and/or from your conference minus the normal miles you commute to and/or from work.

Example:

1. Gail lives in Stillwater (home) and travels a total of 46 miles to and from work each day. On Monday Gail goes to a conference in Schodack and then back home for a total of 84 miles. Gail can submit a claim for 38 miles. If the travel was on a non work day or a Saturday or Sunday, Gail would be reimbursed the total 84 miles.

84 miles (Home to Schodack + Schodack to Home)
minus 46 miles (Home to School + School to Home)
38 miles (reimbursable miles)
Mileage verified on MapQuest

2. Gail leaves home in Stillwater and goes directly to Schodack for a conference then reports to work. Gail would then be entitled to the difference of the mileage from home to work, which is 19 miles.

42 miles (Home to Schodack)
minus 23 miles (Home to School)
19 miles (reimbursable miles)
Mileage verified on MapQuest

When submitting a claim for mileage, please verify the mileage using MapQuest. In an effort to save a tree, no additional paperwork for mileage will be necessary.

3992 NY 2, Troy, New York 12180
(518) 279-4600 Fax (518) 279-4588
www.brittonkill.k12.ny.us

Appendix 6 - Request for Check

BRUNSWICK CENTRAL SCHOOLS

Brittonkill
 3992 NY 2, Troy, New York 12180
 (518) 279-4600
 FAX: (518) 279-1918

Request for Check

VENDOR NUMBER

STATE TAX EXEMPT

VENDOR

DESCRIPTION OF SERVICE/ITEM (PLEASE ATTACH INVOICE/S)

	AMOUNT

CODES _____ / _____ / _____ / _____ \$ _____
 _____ / _____ / _____ / _____ \$ _____
 _____ / _____ / _____ / _____ \$ _____

REQUISITIONED BY _____ DATE _____
Staff Member

APPROVED BY _____ DATE _____
Department Chair/Team Leader

APPROVED BY _____ DATE _____
Administrator

APPROVED BY _____ DATE _____
Superintendent

PER _____ DATE _____
Purchasing Agent

WHITE COPY: BUSINESS OFFICE

PINK COPY: ADMINISTRATOR

