

# Oak Ridge Schools

## Travel Process Overview

*Note: The process has not changed. The forms are now pdf fillable with digital signatures.*

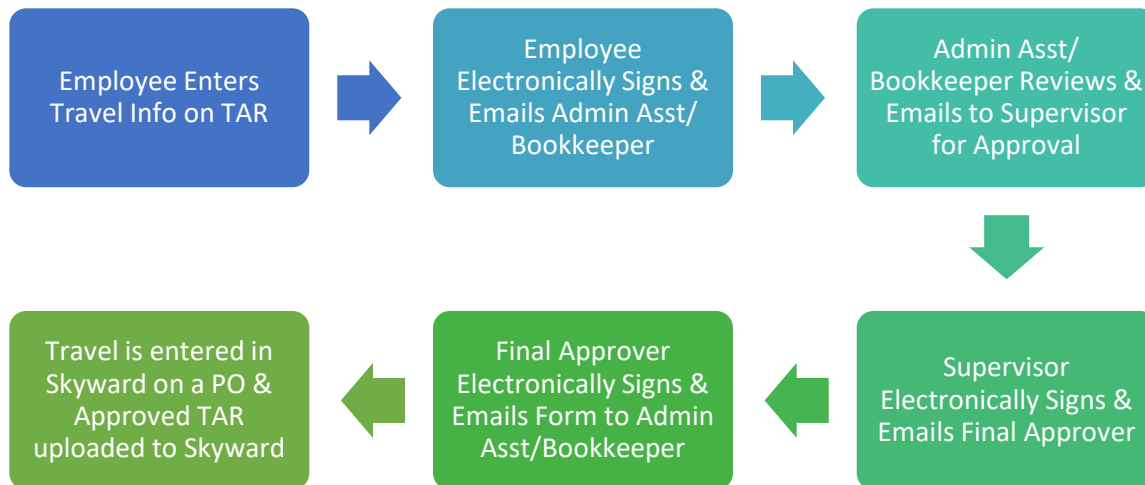
Click one of these links for instructions about a specific form.

[Travel Authorization Request](#)  
[Travel Reimbursement Request](#)  
[Mileage Reimbursement Request](#)  
[Create Electronic Signature](#)

### Travel Authorization Request (TAR)

A Travel Authorization Request (TAR) is required for all travel according to the Oak Ridge Schools Travel Policy. The updated fillable pdfs will allow the District to move away from sending paper forms that may get lost and are hard to track. Forms will now be filled out on a computer, signed electronically, and moved through the process via email until the final document is attached to a purchase order or check request in Skyward.

The basic workflow for TAR approvals is as follows



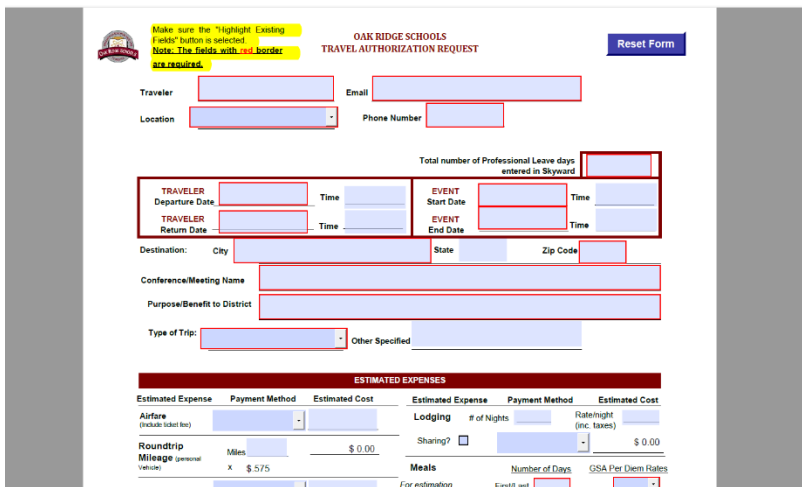
The following steps will walk you through the process of filling out the updated TAR.

- Navigate to [www.ortn.edu](http://www.ortn.edu) > Central Office > Business Offices > Resources > Travel Forms
  - Select the [Travel Authorization Request Form](#)

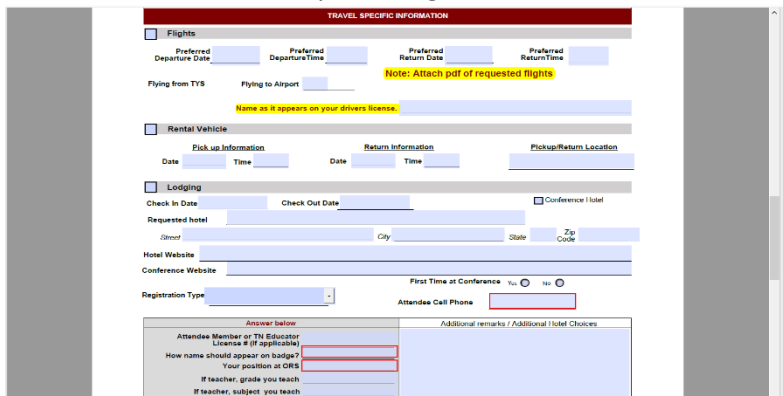
- Download the Form by choosing the Downward pointing arrow



- Save to your computer
- Open document in Adobe Reader
  - Fill out all necessary fields for your travel
  - Fields with a red border are REQUIRED
  - Use the “Reset Form” button as needed to clear the form



- Page 2 includes all Travel Specific Information
  - Fill out all information necessary for your specific trip
    - When in doubt, too much information is better than too little
  - Attach copies of flights, conference information, etc. as necessary



- Electronically sign the form and email to Admin Assistant/Bookkeeper
  - **Save signed form as follows: TAR, School/Dept, Date, Name**
    - **Ex: TAR\_WL\_010620\_JVanDyke**
- Admin Assistant/Bookkeeper will add account numbers, review, and send to Supervisor
- Supervisor will electronically sign form and email to Final Approver
  - Final Approver may be Grant Coordinator or Executive Director

## Travel Reimbursement Request (TRR)

A Travel Reimbursement Request (TRR) is required for all reimbursements for travel. For specific guidelines on what is reimbursable, please reference the [Oak Ridge Schools Travel Policy](#) found on [www.ortn.edu](http://www.ortn.edu).

The following steps will walk you through the process of filling out the updated TRR.

- Navigate to [www.ortn.edu](http://www.ortn.edu) > Central Office > Business Offices > Resources > Travel Forms
  - Select the [Travel Reimbursement Request Form](#)
  - Download the Form by choosing the Downward pointing arrow

- Save to your computer
- Open document in Adobe Reader
  - Fill out all necessary fields for your travel reimbursement
  - Fields with a **red** border are **REQUIRED**

- Electronically sign the form and email to Admin Assistant or Bookkeeper to submit for payment
  - Save signed form as follows: TRR, School/Dept, Date, Name
    - Ex: TRR\_WL\_010620\_JVanDyke

## Mileage Reimbursement Request

A Mileage Reimbursement Request is required for all reimbursements for personal vehicle usage within the District, such as between ORS buildings or for running ORS errands locally.

The following steps will walk you through the process of filling out the updated Mileage Reimbursement Request.

- Navigate to [www.ortn.edu](http://www.ortn.edu) > Central Office > Business Offices > Resources > Travel Forms
  - Select the [Mileage Reimbursement Request Form](#)
  - Download the Form by choosing the Downward pointing arrow
  - Save to your computer
- Open document in Adobe Reader
- Fill out required fields (in red)
- Enter information for any trips made in a personal vehicle
  - Include date of trip, destination(s), and the purpose

- Destinations should be chosen from dropdowns
- Insert mileage for each “leg” of trip

- Total miles and amount due should auto-populate

- Electronically sign the form and email to Admin Assistant or Bookkeeper to submit for payment
  - **Save signed form as follows: Mileage, School/Dept, Date, Name**
    - Ex: Mileage\_WL\_010620\_JVanDyke

## Create Electronic Signature/ Electronically Sign Document

All documents should be signed electronically and attached to a PO, check request, or emailed through the approval process. Paper forms will no longer be accepted.

The following steps will walk you through the process of setting up a digital signature on your computer if you do not already have one.

NOTE: Different versions of Adobe Reader may have slightly different looks to the following screens. The instructions should be basically the same.

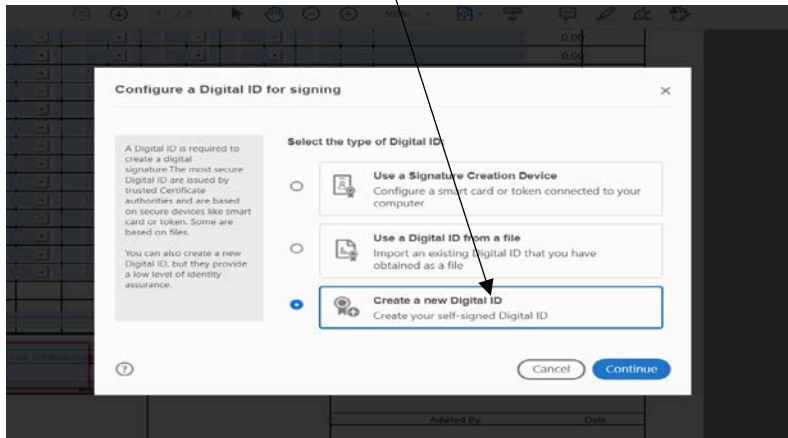
- After completing the form (TAR, TRR, Mileage Reimbursement), click in the Traveler Signature box.

The screenshot shows a reimbursement form with several fields. A red box highlights the signature area, which contains a blue box for the signature and a smaller blue box for the date. An arrow points from the text 'After completing the form... click in the Traveler Signature box.' to this signature area. Other fields include 'PO Number', 'Verified by:', and 'Total Reimbursement due to employee'. A note at the bottom reads: 'Note: Please click in signature box to create/insert digital signature. Save as pdf and forward to admin assistant/bookkeeper/grant coordinator.'

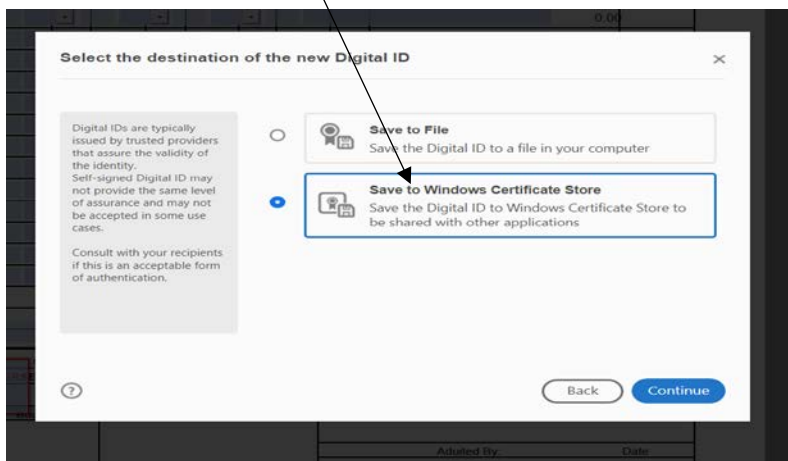
- Choose "Configure Digital ID"

The screenshot shows a spreadsheet with a dialog box titled 'Digital ID Configuration Required'. The dialog box contains the text: 'This signature field requires a digital signature identity. Would you like to configure one now?' and has three buttons: 'Help', 'Configure Digital ID', and 'Cancel'. An arrow points from the text 'Choose "Configure Digital ID"' to the 'Configure Digital ID' button. The spreadsheet background shows columns for 'MILEAGE REIMBURSEMENT PER MILE \$0.60' and 'TOTAL MILES Amount Due'.

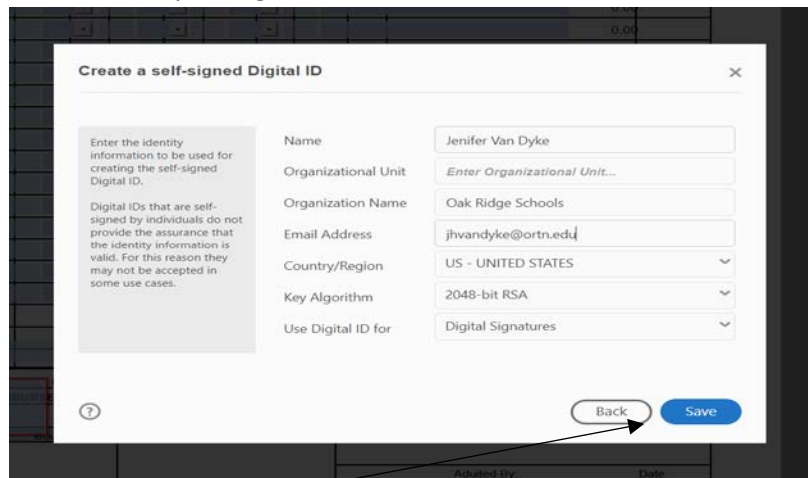
- The following screen will appear.
  - Choose “Create a new Digital ID”



- Choose “Save to Windows Certificate Store”

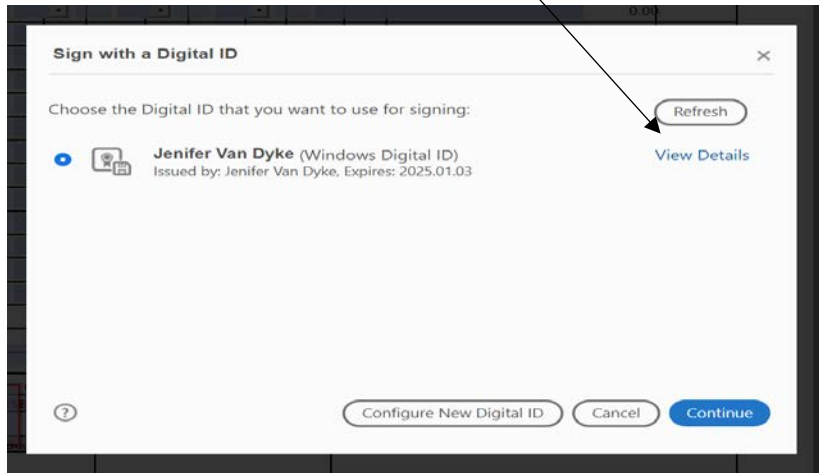


- Enter your name as it should appear on your signed documents
- Enter you Organization Name & Email Address



- Click Save

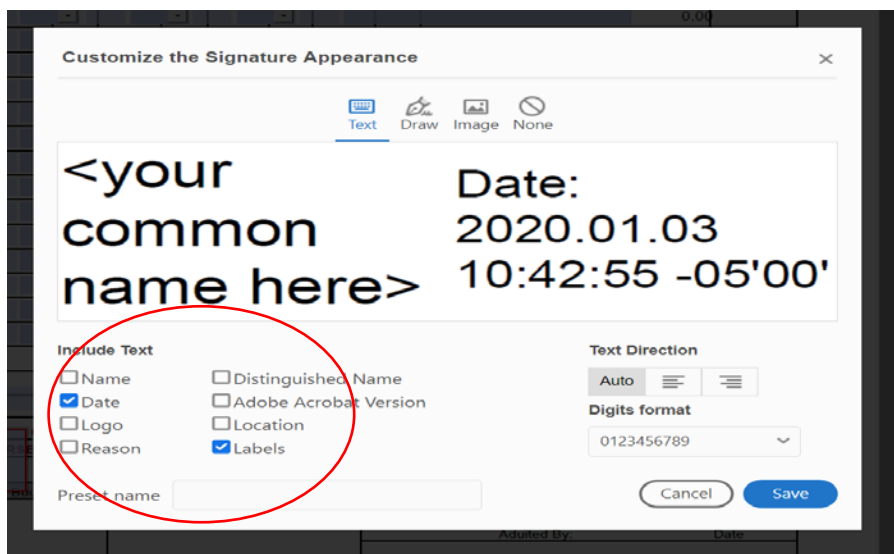
- On the following screen, Choose “View Details”



- On the next screen, you can edit the appearance of your signature
  - Choose “View Certificate Details”

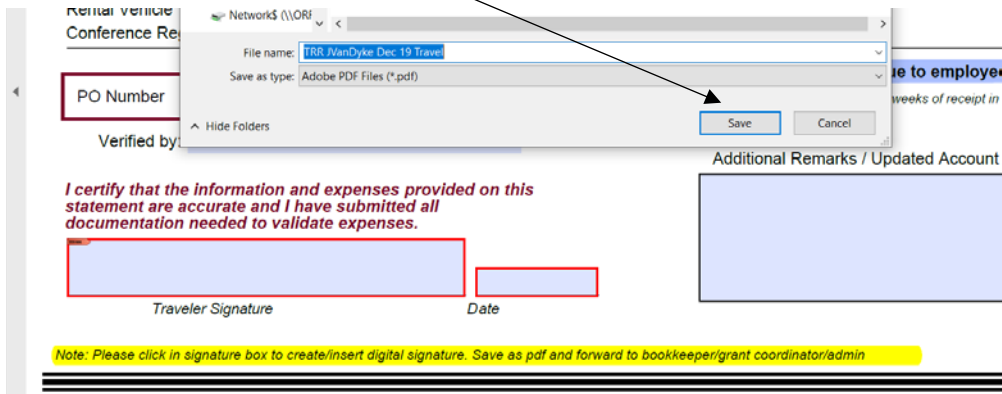


- Make sure only Date & Labels boxes are selected



- Click “Save”
- Your digital signature should now be ready for selection in documents

- On following screen, click "Save"



- The form will now include your digital signature as well as the date and time that you electronically signed the form.

