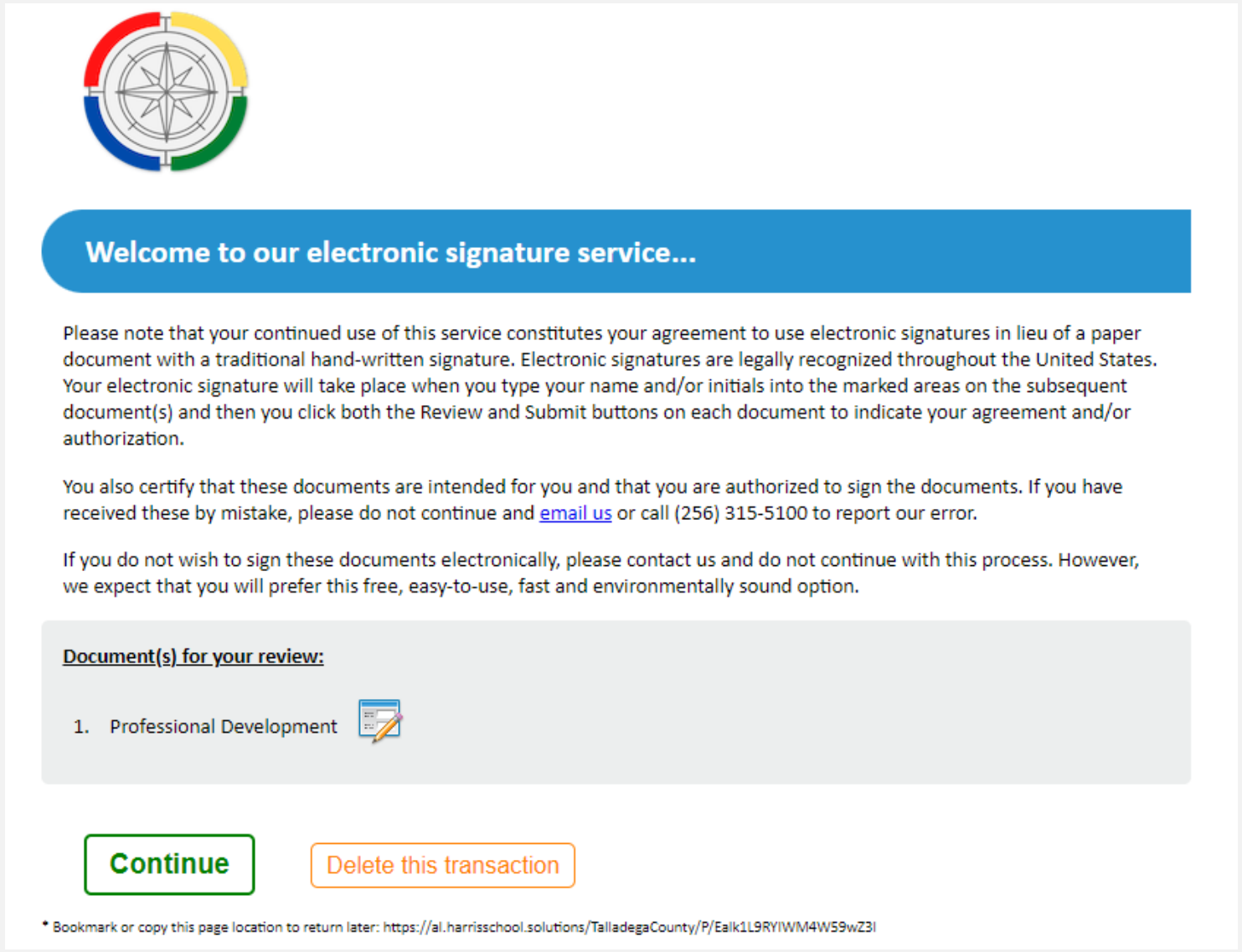
HARRIS SCHOOL FORMS SOLUTIONS

WHAT'S INCLUDED?

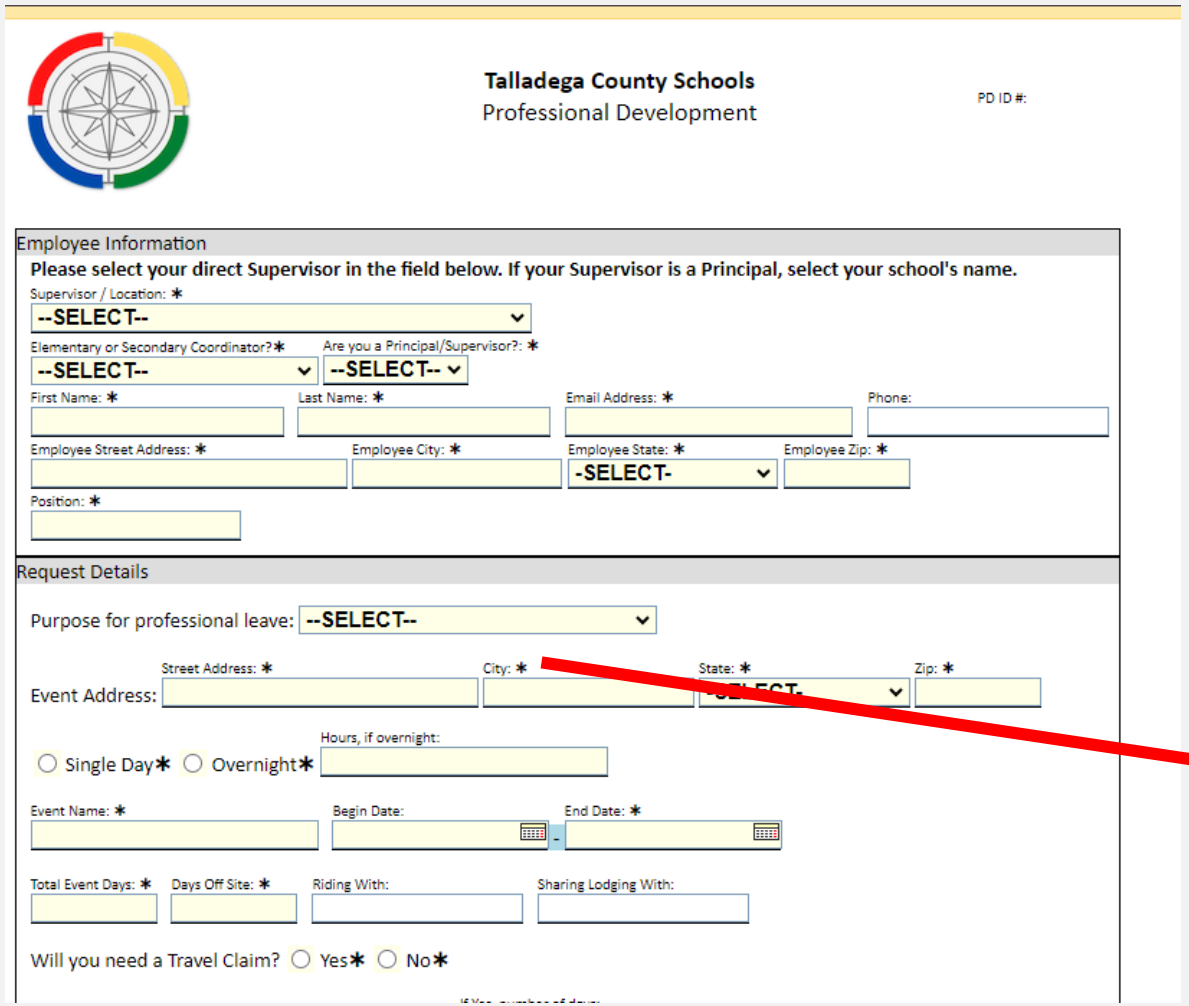
- Software
- Initial Setup Services
- Training Services
- Pre-Built Forms Library
- Custom Form Programming Services

* Forms do not integrate with NextGen *

#LeadingTheWay
Staff Directory
Talladega County Schools
About Us
Board of Education
Departments
For Staff
For Parents
For Students
Employee Self-Service
RSA Website
TCBOE Kronos
Technology Help Desk
Technology Links
Field Trip Request
ALSDE Professional Learning
Leave Requests
Welcome to Talladega County Schools!



Employees are not required to login. They will use their email to complete the form and access it throughout the process.



Talladega County Schools
Professional Development

PD ID #:

Employee Information

Please select your direct Supervisor in the field below. If your Supervisor is a Principal, select your school's name.

Supervisor / Location: * --SELECT--

Elementary or Secondary Coordinator?* --SELECT-- | Are you a Principal/Supervisor?: * --SELECT--

First Name: * | Last Name: * | Email Address: * | Phone:

Employee Street Address: * | Employee City: * | Employee State: * -SELECT- | Employee Zip: *

Position: *

Request Details

Purpose for professional leave: --SELECT--

Event Address: Street Address: * | City: * | State: * | Zip: *

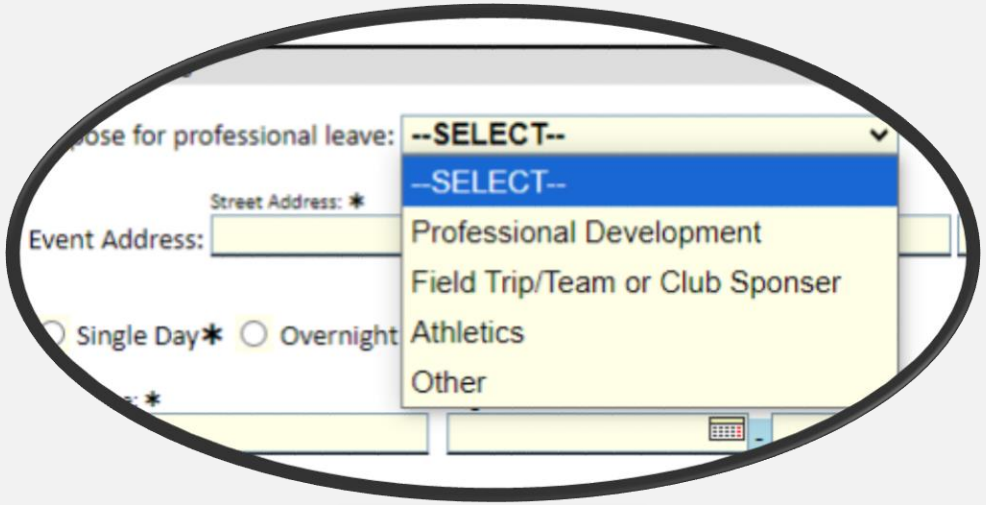
Single Day* Overnight* Hours, if overnight:

Event Name: * | Begin Date: | End Date: *

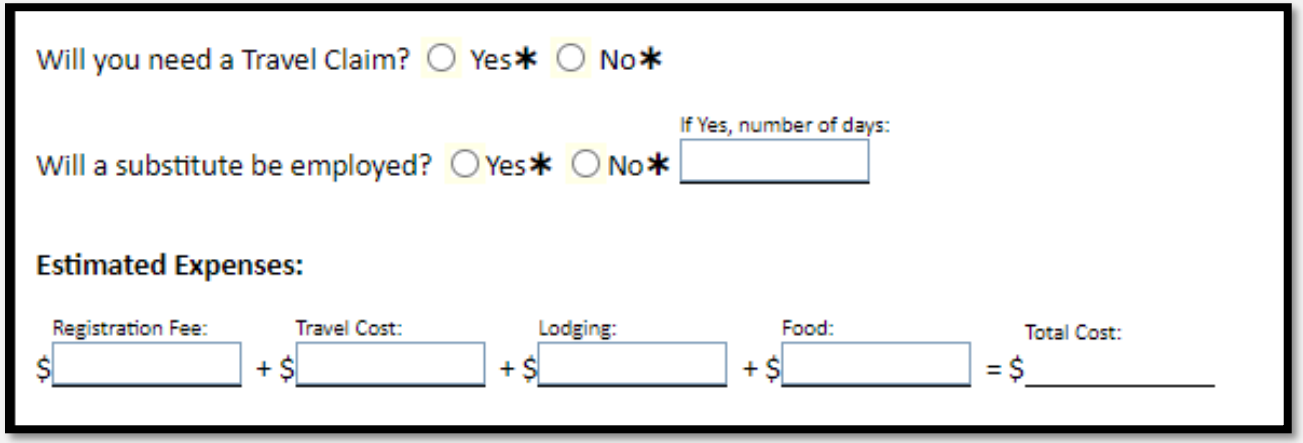
Total Event Days: * | Days Off Site: * | Riding With: | Sharing Lodging With:

Will you need a Travel Claim? Yes* No*

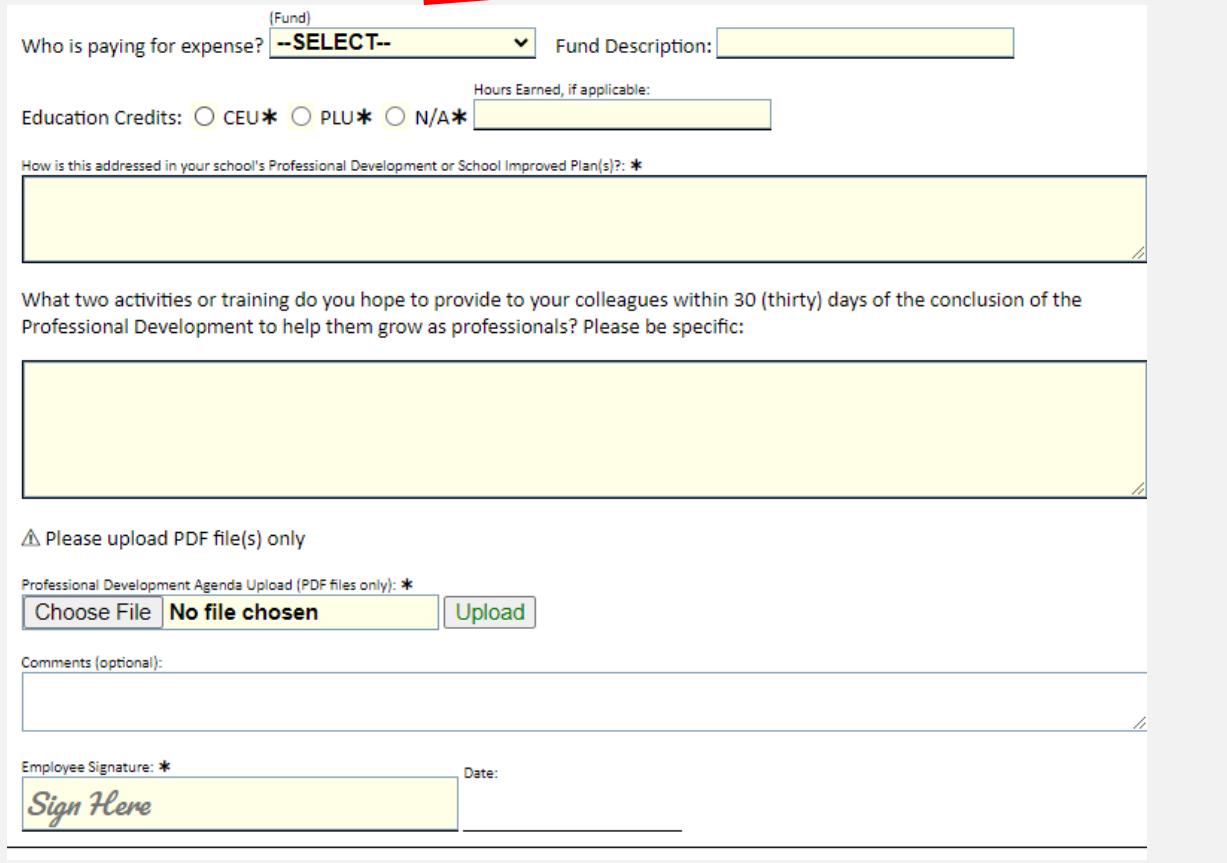
- Employees must provide response to all fields
- Responses will determine how the form is routed
- PD ID # automatically created for tracking and payment purposes

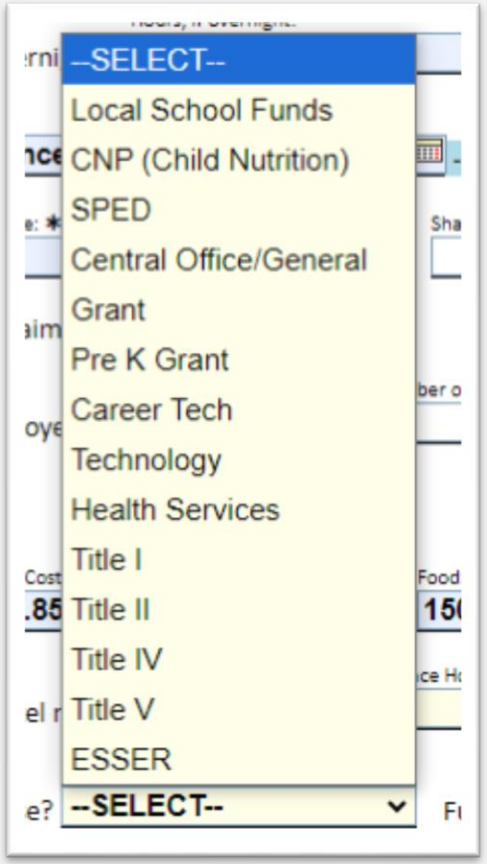


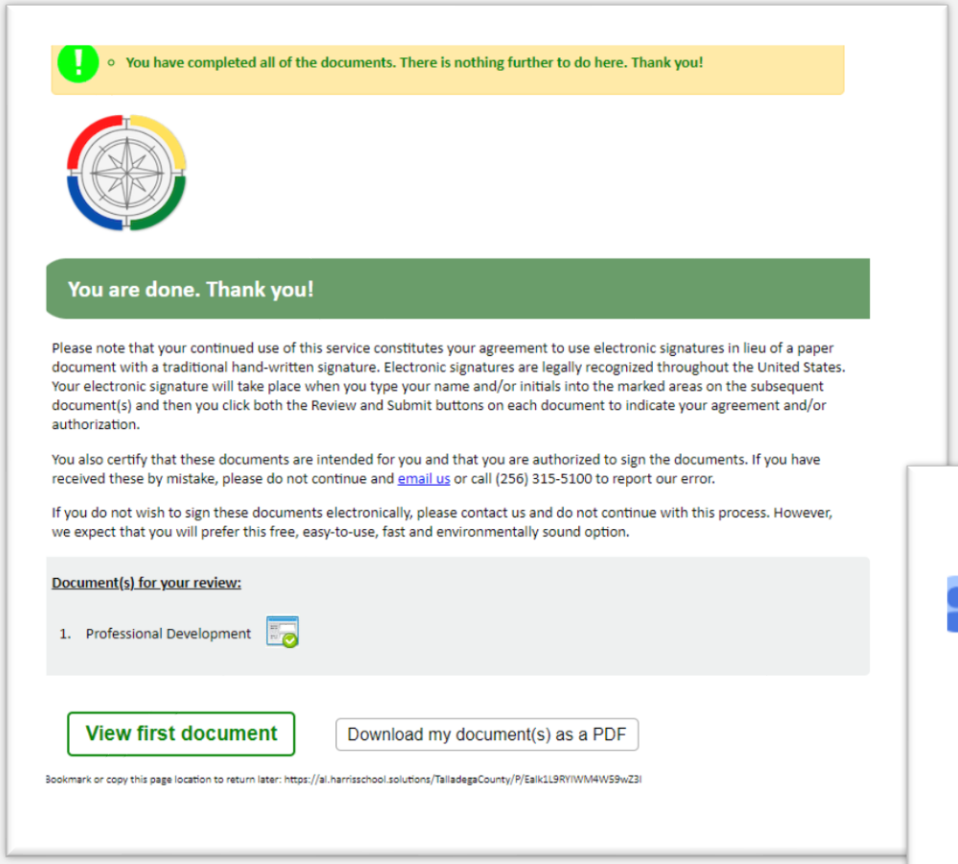
- If expenses will be reimbursed, employees must select “Yes” for Travel Claim
- Travel claim auto generates via email at the end of the return date
- Recommend entering amounts for all expected expenses



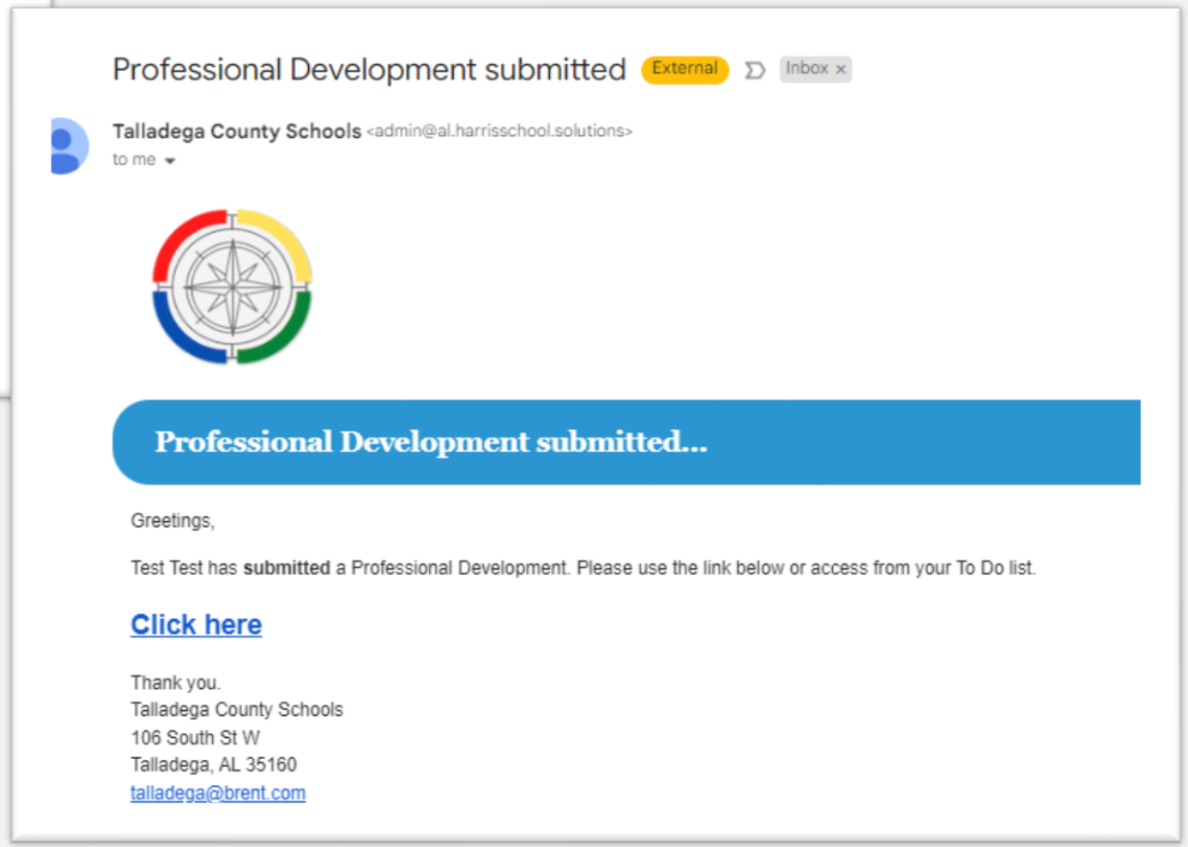
- Employees must select the correct fund source
- The fund/school secretary (Level I fund approver) will enter the GL code for payment







- Confirmation sent to email provided on the form
- Form is immediately routed for approval
- Encourage employees to submit request prior to leaving in order to obtain proper approval



Approvers:

Fund Secretary

School Secretary

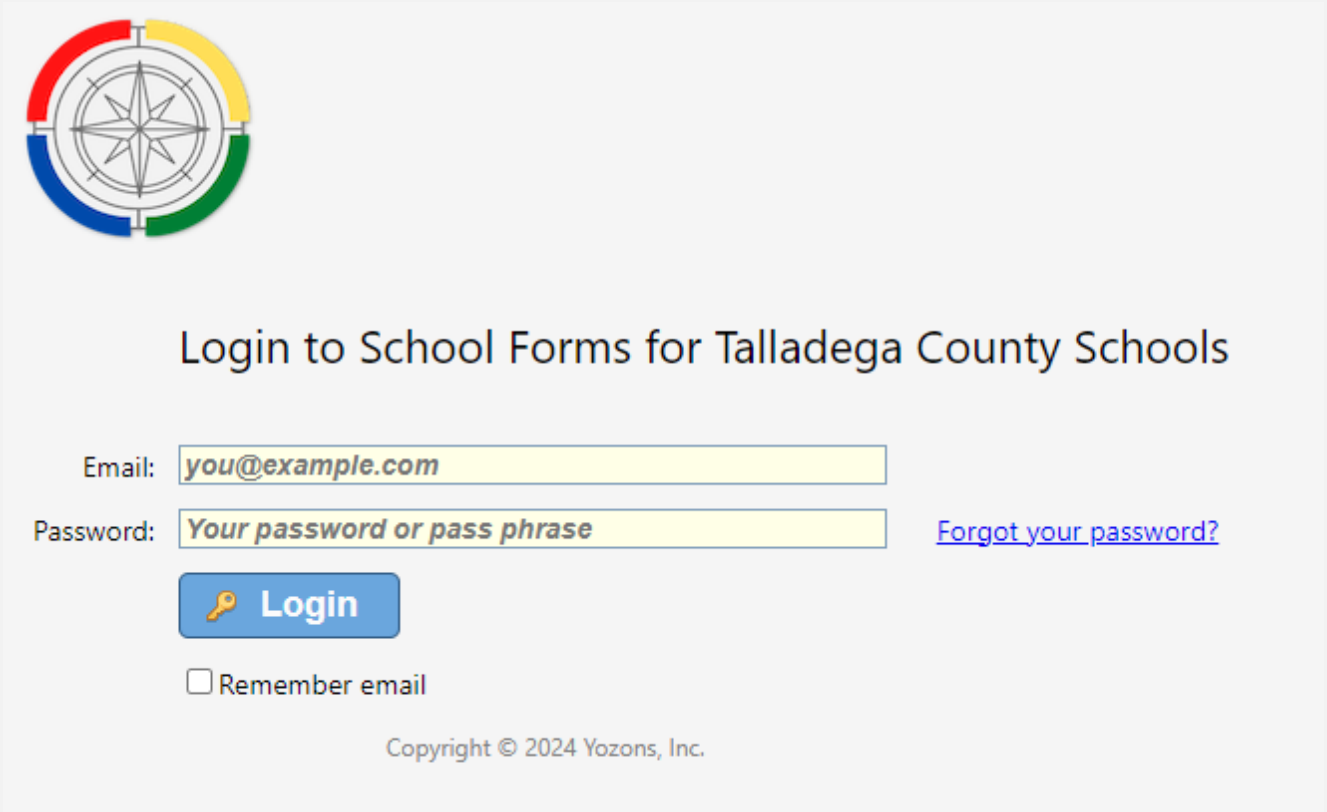
Principal

Central Office

Administrators

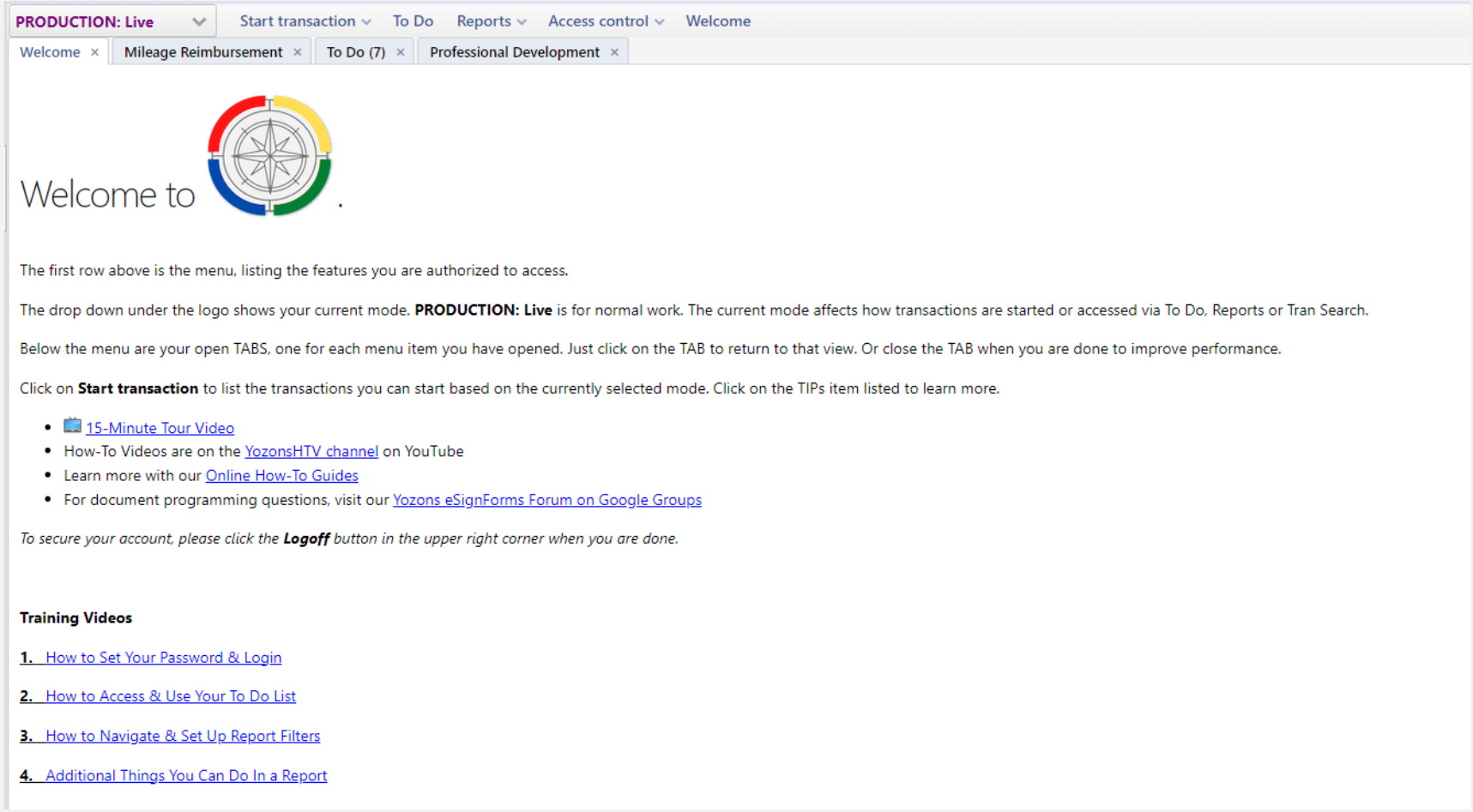
CSFO

Superintendent



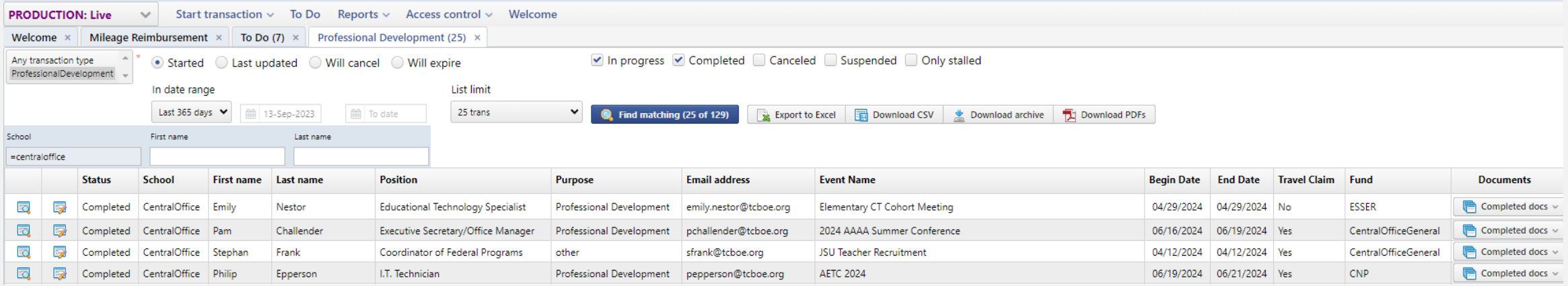
Access

- ToDo List
- Perform Queries
- Check Status
- Training



Performing Queries

- Use query to locate forms with any status
- Based on location
- Convert list to spreadsheet, CSV, and/or PDF



Status	School	First name	Last name	Position	Purpose	Email address	Event Name	Begin Date	End Date	Travel Claim	Fund	Documents
Completed	CentralOffice	Emily	Nestor	Educational Technology Specialist	Professional Development	emily.nestor@tcboe.org	Elementary CT Cohort Meeting	04/29/2024	04/29/2024	No	ESSER	Completed docs
Completed	CentralOffice	Pam	Challender	Executive Secretary/Office Manager	Professional Development	pchallender@tcboe.org	2024 AAAA Summer Conference	06/16/2024	06/19/2024	Yes	CentralOfficeGeneral	Completed docs
Completed	CentralOffice	Stephan	Frank	Coordinator of Federal Programs	other	sfrank@tcboe.org	JSU Teacher Recruitment	04/12/2024	04/12/2024	Yes	CentralOfficeGeneral	Completed docs
Completed	CentralOffice	Philip	Epperson	I.T. Technician	Professional Development	pepperson@tcboe.org	AETC 2024	06/19/2024	06/21/2024	Yes	CNP	Completed docs

ProfessionalDevelopment - Transaction detail for id: f3b72f90-a2ca-4904-9769-a80e5dcab4f7

Production Transaction	Package	Brand library	Id
ProfessionalDevelopment	ProfessionalDevelopment [11] (Old)	Lib/Schools	f3b72f90-a2ca-4904-9769-a80e5dcab4f7

Status	Expires	Auto-cancels	Stalled
Completed [Employee_ViewOptional (ProfessionalDevelopment)]	Never	Never	No

Started	Started by	Last updated	Last updated by
2024-04-18 10:14:16 CDT		2024-04-19 12:37:37 CDT	

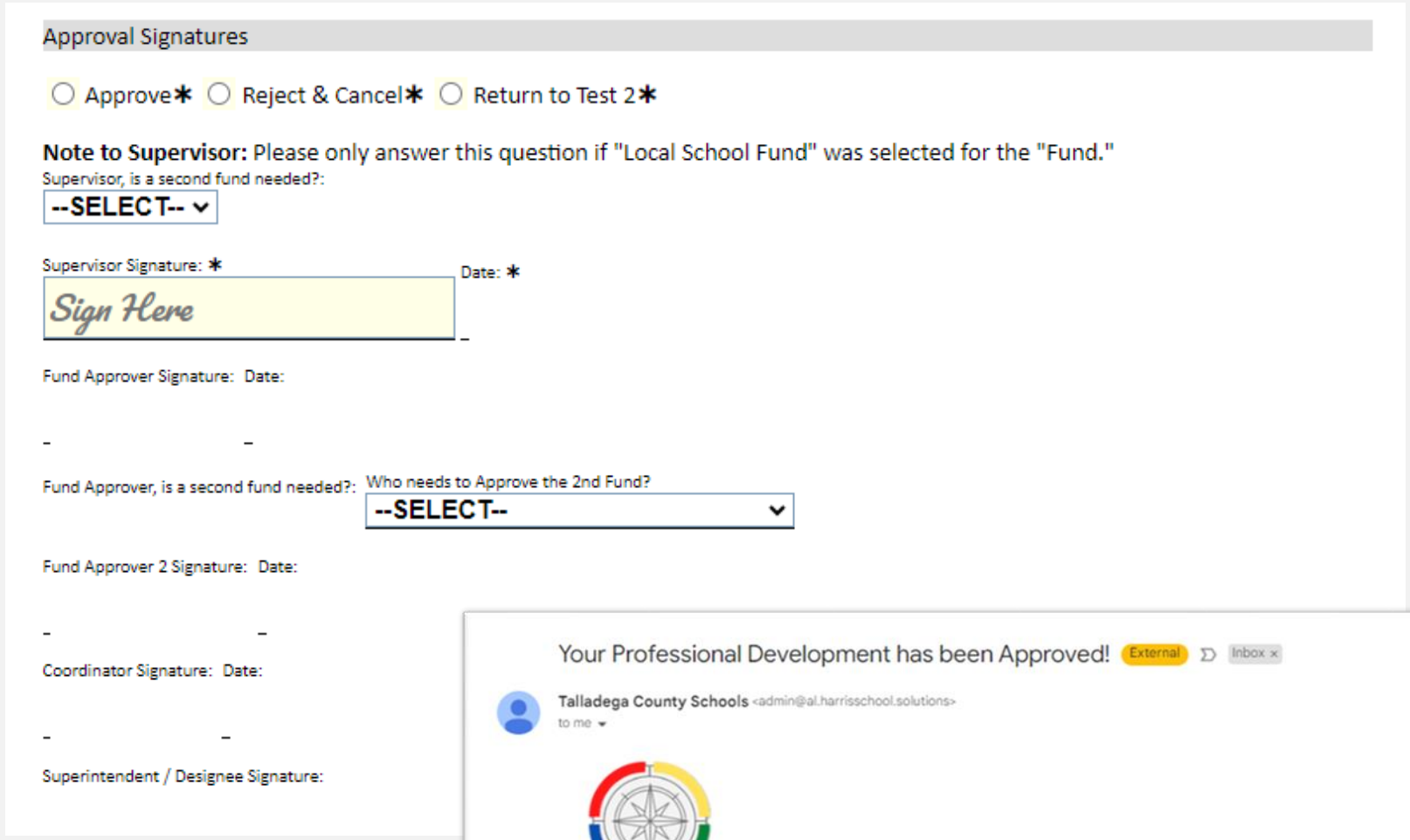
Reason/note to log | Change status / Add log record | View activity log... | View email... | View HTTP Send... | Completed docs | Download transaction data

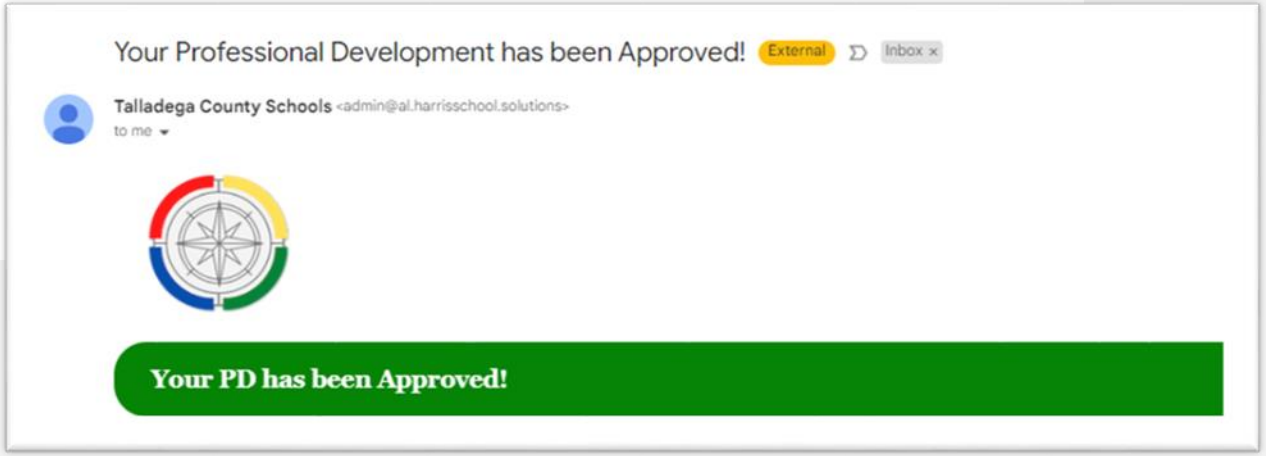
Party	Status	# Documents	Email	SMS Phone	User	Last accessed	Created	Email/SMS
Employee	**Completed**	1	emily.nestor@tcboe.org			2024-04-18 10:16:21 CDT	2024-04-18 10:14:16 CDT	More
Supervisor	**Completed**	1	vozment@tcboe.org		Dr. Vicky Ozment <vozment@tcboe.org>	2024-04-18 11:08:54 CDT	2024-04-18 10:14:16 CDT	More
FundApprover	**Completed**	1	mallory.duncan@tcboe.org		Mallory Duncan <mallory.duncan@tcboe.org>	2024-04-19 10:17:10 CDT	2024-04-18 10:14:16 CDT	More
FundApprover2	*Skipped*	1					2024-04-18 10:14:16 CDT	More
Coordinator	**Completed**	1	eharris@tcboe.org		Emily Harris <eharris@tcboe.org>	2024-04-19 10:52:37 CDT	2024-04-18 10:14:16 CDT	More
Superintendent	**Completed**	1	vozment@tcboe.org		Dr. Vicky Ozment <vozment@tcboe.org>	2024-04-19 12:32:41 CDT	2024-04-18 10:14:16 CDT	More
Employee_ViewOptional	**Completed**	1	emily.nestor@tcboe.org				2024-04-18 10:14:16 CDT	More
Payroll_ViewOptional	**Completed**	1					2024-04-18 10:14:16 CDT	More
ESF_reports_access	*Not yet activated*	1					2024-04-18 10:14:16 CDT	

Document	Document Version Id	Transaction Document Id
ProfessionalDevelopment [13] (Old)	96e75315-1cf0-4e63-bdbc-0ef6d7dfb841	f03cab3a-a483-4b2c-9657-e4550bb39a1b

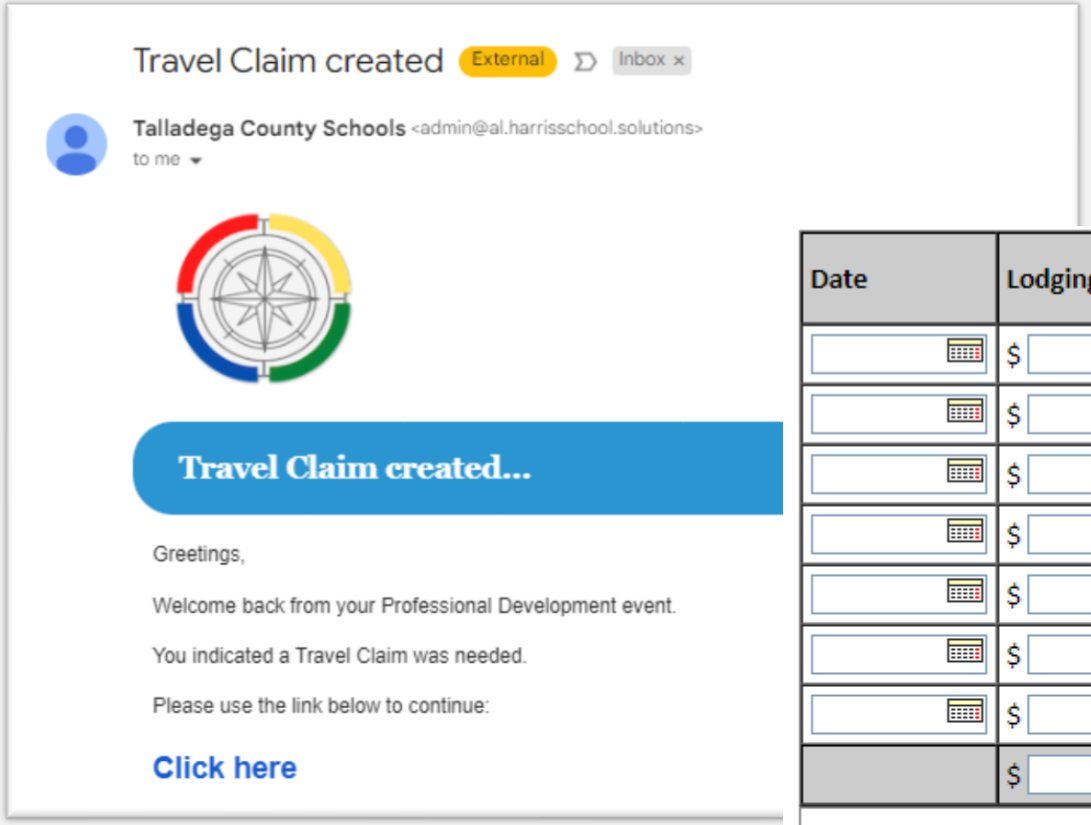
Download ProfessionalDevelopment data | Uploaded files

Party	Status	Document status	Last updated	Snapshot taken	Snapshot when submitted
Employee	**Completed**	Completed	2024-04-18 10:16:22 CDT	2024-04-18 10:16:21 CDT	View/download snapshot
Supervisor	**Completed**	Completed	2024-04-18 11:08:54 CDT	2024-04-18 11:08:54 CDT	View/download snapshot
FundApprover	**Completed**	Completed	2024-04-19 10:17:10 CDT	2024-04-19 10:17:10 CDT	View/download snapshot
FundApprover2	*Skipped*	*Not yet retrieved*	2024-04-18 10:14:16 CDT		
Coordinator	**Completed**	Completed	2024-04-19 10:52:37 CDT	2024-04-19 10:52:37 CDT	View/download snapshot
Superintendent	**Completed**	Completed	2024-04-19 12:32:41 CDT	2024-04-19 12:32:41 CDT	View/download snapshot
Employee_ViewOptional	**Completed**	Viewed	2024-04-19 12:37:37 CDT		





- Approve, Reject, or Return
- Assign second approver
- If rejected, must provide explanation



Date	Lodging	Breakfast	Lunch	Dinner	Meal Total	Other	Other Description	Transportation
	$	$	$	$	$	$		☐ Airplane
	$	$	$	$	$	$		
	$	$	$	$	$	$		☐ Automobile
	$	$	$	$	$	$		
	$	$	$	$	$	$		Mileage * 0.67
	$	$	$	$	$	$		$
	$	$	$	$	$	$		$ *Parking*
	$	$	$	$		$		

PD form, if applicable:
ProfessionalDevelopment_2,Test.pdf 90.2KB ***(Please read)***

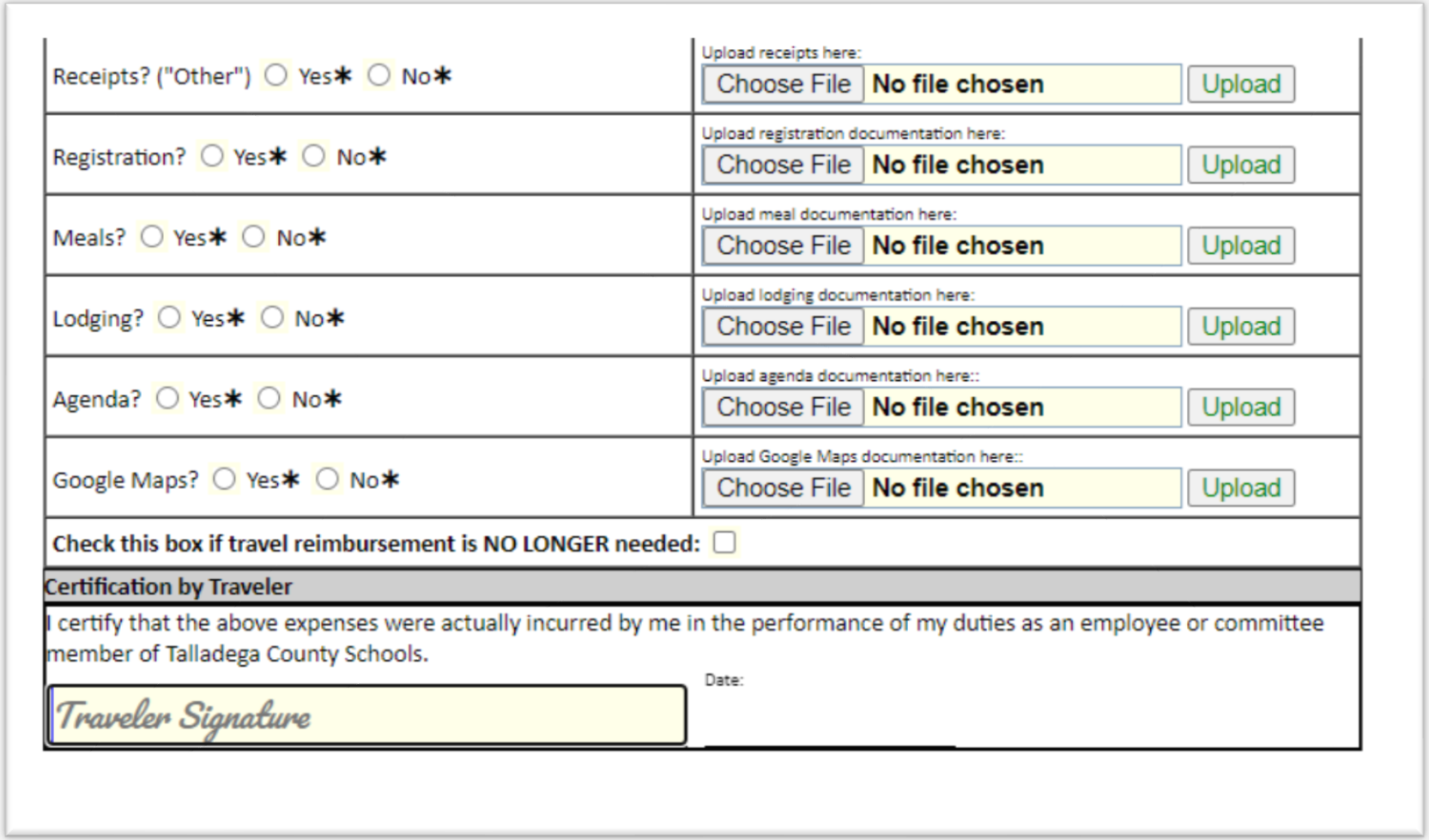
Total:

If 'Other' expenses, please explain:

⚠ Please upload PDF file(s) only

- Enter expenses per day
- Form calculates mileage based on current rate
- Other column is used for rideshare and parking expenses

- Attachment (receipt) required for all expenses claimed
- Recommend all documents be PDF format
- Claims must be in align with our financial procedures



Receipts? ("Other") ○ Yes* ○ No*	Upload receipts here: Choose File No file chosen Upload
Registration? ○ Yes* ○ No*	Upload registration documentation here: Choose File No file chosen Upload
Meals? ○ Yes* ○ No*	Upload meal documentation here: Choose File No file chosen Upload
Lodging? ○ Yes* ○ No*	Upload lodging documentation here: Choose File No file chosen Upload
Agenda? ○ Yes* ○ No*	Upload agenda documentation here:: Choose File No file chosen Upload
Google Maps? ○ Yes* ○ No*	Upload Google Maps documentation here:: Choose File No file chosen Upload
Check this box if travel reimbursement is NO LONGER needed: ☐	

Certification by Traveler

I certify that the above expenses were actually incurred by me in the performance of my duties as an employee or committee member of Talladega County Schools.

Traveler Signature

Date:

Harris offers a wide range of customizable forms. Examples of other forms we considered are:

- New Vendor Requests
- Inventory
  - Additions, Requests for Transfers & Deletions
- Vouchers
- Receipt Book Log
- Return Check Log

QUESTIONS?