



TRANSPORTATION REQUESTS

FIELD TRIPS // ATHLETIC TRIPS // VAN REQUESTS // SUBURBAN REQUESTS

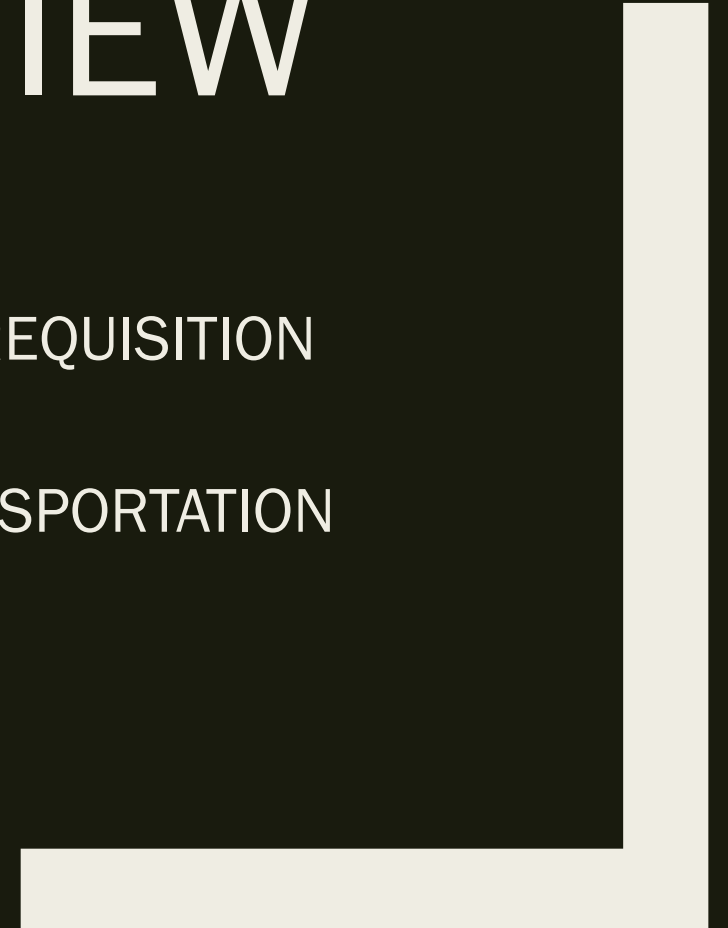
Transportation Department 08/15



PROCESS OVERVIEW

SUBMIT REQUEST // RECEIVE QUOTE // SUBMIT REQUISITION

RECEIVE PO # // ACCEPT QUOTE // RECEIVE TRANSPORTATION



Access Laserfiche Forms Ifforms.eisd.net

The screenshot displays the Laserfiche Forms web application interface. At the top, there is a dark blue navigation bar with the text "Laserfiche Forms™" and menu items "Inbox", "Reports", and "Manage". Below this, the main content area is titled "Inbox" and features a green "Start process" button. A sidebar on the left lists "Pending Tasks", "My History", and "Drafts". The main area also includes a search bar labeled "Search by process" and a "Group by: Date Assigned" dropdown menu. A "Task" section is visible below. Overlaid on the right side is a white "Start Process" dialog box with a close button (X) in the top right corner. It contains a search input field labeled "Search by process name" and a list of processes. The first item in the list is "★ TRANS- Trip/Vehicle Request Form", which has a green "Start" button next to it.

Initial Request

INSTANCE NUMBER: This is an auto-generated number that is the new Ticket Number. You can use this number to reference the trip throughout the process.

CAMPUS TYPE: Select **CAMPUS**, **CURRICULUM** or **OPERATIONS**

CAMPUS NAME: Select the campus or department you are submitting the ticket for/from.

ADMIN/ADMIN EMAIL: Auto-populated based on the Campus information.


Trip/Vehicle Request Form

Transportation Department

Instance Number

Date

Name of Person Requesting Trip*

Campus Type* 

Please select an option.

- CAMPUS
- CURRICULUM
- OPERATIONS

Campus Name*

Please select an option.

Admin

Admin Email

Initial Request

FUNDING SOURCE: If this trip has a funding source, click **Yes** and select the funding source from the drop down that will appear. The funding sources are **CATE, STATE FEDERAL, HEADSTART, BILINGUAL/ESL** and **SPECIAL EDUCATION**.

DESTINATION: Select from the drop down menu. Most locations that the district has previously visited will appear. If your destination is not on the list, select **OTHER** and you will be prompted to Enter the **NAME** and **ADDRESS** of the destination.

Funding Source* Yes No

Funding Source Name* Please select an option.

Destination* Please fill out this field.

Budget Code* Please fill out this field.

✓

- CATE
- STATE FEDERAL
- HEADSTART
- BILINGUAL/ESL
- SPECIAL EDUCATION

Initial Request

REQUEST DETAIL: Enter any additional stops or instructions. Please double check with your team that the POC is not planning any additional stops for meals, etc as this will create a mileage overage and require a Validation Memo to AP.

VEHICLE REQUESTING: If you are requesting a Bus/Activity bus with a Lift, the form will prompt you to enter the number of wheelchairs.

DEPARTURE TIME FROM CAMPUS: This is the time that the bus will be Departing from the campus, not arriving at the campus to load.

RETURN TIME TO CAMPUS: This is the time that the bus should be arriving back at the home campus/department, and is not the time the bus will be arriving at the Trip location for pick up.

Request Detail * Please add additional stops, locations, and any other information needed.


Please fill out this field.

Vehicle Requesting * Select all that apply.


<input type="checkbox"/> Bus	<input type="checkbox"/> Bus w/Lift
<input type="checkbox"/> Van (11 passenger)	<input type="checkbox"/> Suburban (8 passenger)
<input type="checkbox"/> Activity Bus	<input type="checkbox"/> Activity Bus w/Lift

Vehicle Equipment * Band Trailer Ice Chest

Departure Time From Campus (Trips unavailable between 6:30 am - 8:30 am and 2:30 pm - 4:30 pm)

Date *  **Time *** AM PM

Return Time To Campus (Trips unavailable between 6:30 am - 8:30 am and 2:30 pm - 4:30 pm)

Date *  **Time *** AM PM

Initial Request

GROUP NAME: Please make sure you are specific with the Group Name. With the high volume of tickets it is important to have as much information as possible.

NUMBER OF TEACHER IN CHARGE: This needs to be a cell phone number for the Trip POC (Teacher/Coach, etc). This is the number that the drivers and Transportation Department will use to communicate on the day of the trip.

SPECIAL INSTRUCTIONS OR DIRECTIONS: Enter in any additional information that will be helpful, including pickup location instructions. All drivers are instructed to pick up in front of the school unless this form designates otherwise.

SUBMIT: Please verify that you have entered all the information in correctly and hit submit.

IT WILL NOW GO TO PRINCIPAL/DEPT HEAD FOR APPROVAL.

Student/Teacher Information

Group Name * Example: Football team, 5th grade reading club, etc...

Number of Students *

Number of Adults (Chaperon) *

Name of Teacher in Charge *

Contact Number of Teacher in Charge *

Special Instructions or Directions * Please list any additional stops to be included with requested trip.

Submit


Receipt of Quote

QUOTE TOTAL: This is the total that will be charged to you pending any last minute changes to the trip. The destination is now calculated from the Central Office (Bus Barn).

AFTER REVIEWING THE QUOTE, IF YOU WISH TO PROCEED, ENTER YOUR REQUISITION INTO TXEIS AND WAIT FOR THE PO.

ACCEPT QUOTE: Once you have received your PO#, click **ACCEPT QUOTE** and enter your PO Number then submit. If you do not accept the quote, the process will be terminated.

YOU WILL RECEIVE A COPY OF THE INVOICE THAT GOES TO ACCOUNTS PAYABLE VIA EMAIL WHEN TRIP IS COMPLETE.

Trip/Vehicle Request Form (Quote for Campus) 

Transportation Department

Instance Number

Transportation Quote

Available Yes No

Number of Vehicles

Mileage

Rate

Quote Total

Notes/Comments

Accept Quote?* Yes No

PO Number*

AFTER THE TRIP

- After the trip has completed, you will receive an emailed copy of the Invoice as it is submitted by Transportation to AP.
- If the amount being charged is different from the quote, the form will route back to you with an explanation of the difference, as well as a note from AP to submit a Validation or any other action needed. Once you complete the needed Validation, etc. it will route to your principal or department head for their acknowledgement before the form is sent to AP.
- The invoice is sent to AP in the same way that Partial Pays, etc are sent, so AP will receive it in real time.

Notes

- If the trip took extra stops, etc. you and your principal will receive the form again with the overage information, and instructions to submit Validation Memo, etc. before it is assigned to Accounts Payable.
- Please double check with the PIC for the trip to verify additional stops BEFORE submitting initial request.
- Drivers can not drive over 60 mph.
- Drivers are not allowed to take Toll roads. The tolls come out of their paychecks.
- Questions? Email michelle.garcia1@eisd.net or x. 4619
- Suburbans/Vans follow the same process