



InformedK12

TIPS AND BEST PRACTICES

LPC ADMINISTRATIVE SERVICES

Instructions

- ▶ Instructions pop up on most forms when you initiate a document
- ▶ This pop up can be viewed again any time you press the **Save** button

 Save Progress

Instructions

Fill out all necessary information related to your request. **Please note, when sending your request forward, Steps 2-4 are optional. If any of those steps don't apply to your request, please un-check the box to disable the step. Step 5 is always required.**

- **Budget** | Your budget must be properly allocated for the expense. If a budget transfer is needed (on CLASS-Web or on InformedK12), please complete one and note the reference number on the Budget Transfer field. Any requests with insufficient budget that are missing the BT reference number will be returned.
- **Invoices** | Only one invoice per form. Quotes are never accepted on Disbursement Requests.
- **Receipts** | Receipts **must** be itemized **and** show proof of payment. If either of these elements are lacking, your request will be returned pending additional supporting documentation. You do not need to list every receipt in the description fields.
- **W#** | If you are submitting a reimbursement, the W# of the person we are paying must be entered. For vendor payments, enter the vendor ID, if known, or put "unknown." Do not put your own W# on a request for a vendor payment.
- **Address** | *Do not enter the college's address.* For reimbursements, the employee's current address must be entered and must match Banner. For vendor payments, enter the address from the invoice (usually under "Remit To").
- **ASB/Student Life** | ASB-funded requests must have the appropriate minutes attached to this form. The minutes should indicate the approved budget that is sufficient to cover the expense.
- **New Vendors** | If you believe this may be a new vendor that has not been set up in Banner, please request that the vendor complete a **Vendor Profile App** and **W9** and attach to this form.

For more information, please visit

<https://laspositascollege.edu/adminservices/disbursementrequests.php>

OK

W#/Vendor ID (Banner ID)

- ▶ The W#/Vendor ID field is for the ID of the person/entity we are paying, not who is filling out the form.
- ▶ Do not put your W# unless we are reimbursing you.
- ▶ Do not duplicate the vendor name in this field. If you don't know the W#, enter "unknown" or email Admin Services.

Vendor/Employee W#: W12980795 ← Jane Doe's W#

Check Payable To: California Accreditation League

Address: 7000 Business Street

City, State, Zip: Livermore CA 94551

Check Disposition: Mail (above address via USPS) ▼

Vendor/Employee W#: California Accreditation League

Check Payable To: California Accreditation League

Address: 7000 Business Street

City, State, Zip: Livermore CA 94551

Check Disposition: Mail (above address via USPS) ▼

Address

- ▶ The address on the form must match Banner.
- ▶ Change to your address?
 - ▶ Employees must update their address with HR.
 - ▶ Students must update their address with Admissions & Records.
- ▶ For invoices, the address on the invoice must match with the form.



Correspondence Address:
5000 Tuttle Crossing Blvd
Dublin, OH 43016
PHONE: (800) 533-0523
FAX: (800) 257-5713
www.boundtree.com



Please Remit To:
BOUND TREE MEDICAL, LLC.
23537 Network Place
Chicago, IL 60673-1235

Vendor/Employee W#:	@00101692 BI-2		
Check Payable To:	Bound Tree Medical, LLC		
Address:	23537 Network Place		
City, State, Zip:	Chicago	IL	60673-1235
Check Disposition:	Mail (above address via USPS) ▼		

Attachments

- ▶ Must be clear and contain necessary/required information (name of business, date, itemized charges, total cost, etc.)
- ▶ PDF attachments only. Other file types (Word, Excel, etc.) do not load/save correctly and will be returned for correction.
- ▶ Please attach receipts/backup in a single PDF.



Contracts

- ▶ The Contract (page 1) can **ONLY** be edited by the **initiator**. Triple-check details *before* sending it to the contractor. Errors on page 1 can't be fixed by anyone else, it must be returned to Step 1 for correction and then resubmitted to the Contractor.
- ▶ This is to ensure that important details like duties, cost, and duration are agreed upon/approved by the Initiator and the Contractor.
- ▶ Note: Catering orders no longer require a Contract for Services

Chabot-Las Positas Community College District
Contract for Services

GENERATED
ON SUBMIT

This is a contract for professional services between the Chabot-Las Positas Community College District ("District") and , Independent Contractor ("Contractor"), entered this of .

1. Contractor agrees to perform the following services in his/her capacity:

2. Contractor hereby understands that no employment relationship is established by this contract for services.

3. The Contractor shall provide his/her own Workers' Compensation Insurance and shall properly report all income in accordance with federal and state law (Labor Code § 3700).

4. Contractor shall be in compliance with the Drug Free Workplace Act of 1988. *Dates may not cross fiscal years.

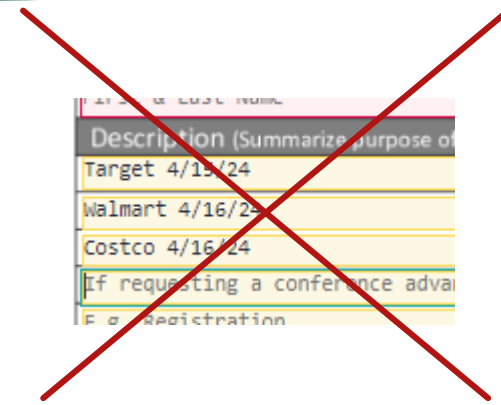
5. Services shall begin on or about / / , and terminate on or before / / . Services shall not be assigned nor subcontracted to another party without written consent of the District.

6. District agrees to pay the Contractor the sum of \$, payable as follows, upon receipt of an invoice, if the services performed are satisfactory to the District.

Date Payment

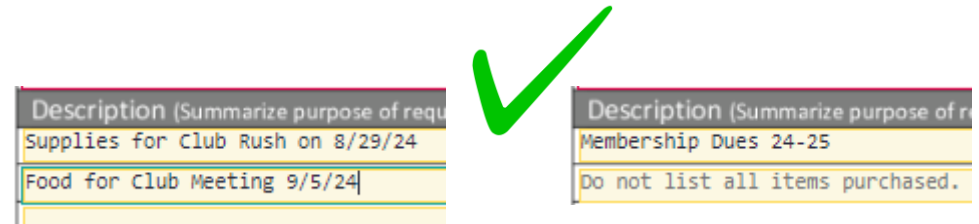
Description

- ▶ On Disbursement Requests, the description does not need to be detailed. Keep it simple. Do not itemize charges. Include the purpose of the expense or group similar charges.



Description (Summarize purpose of request)
Target 4/15/24
Walmart 4/16/24
Costco 4/16/24
If requesting a conference advance
For registration

- ▶ Examples:
 - ▶ “Membership Dues 24-25”
 - ▶ “Food for Club Day”



Description (Summarize purpose of request)
Supplies for Club Rush on 8/29/24
Food for Club Meeting 9/5/24

Description (Summarize purpose of request)
Membership Dues 24-25
Do not list all items purchased.

Coordinators

- ▶ Some submissions require Coordinator approval before an Administrator.
- ▶ These steps will appear as optional. If applicable, please select the appropriate Coordinator that manages the budget for your submission.

Next steps/approvers

Enter the necessary approvers and uncheck any steps that aren't needed. [Learn more](#)


<input type="checkbox"/>	STEP	NAME	EMAIL
<input type="checkbox"/>	Step 2 - [Optional] Route to IT for review? (all technology & software)	Select Approver...	
<input type="checkbox"/>	Step 3 - [Optional] Categorical Program Assistant (review)	Select Approver...	
<input checked="" type="checkbox"/>	Step 4 - [Optional] Coordinator/Director (approval)	Student Life Josue Hernandez [Coordinator] (jahernandez@laspositas)	
<input checked="" type="checkbox"/>	Step 5 - Assistant (review) (this step is required)	Administrative Services Kiley Zieker [Executive Assistant] (Sub: trothm	

Conferences

- ▶ Include the first and last date of travel. The District will only reimburse you for expenses that incurred within the dates on your Conference Leave Request.
 - ▶ E.g. if the conference is on Oct. 23rd - 25th, but you are traveling the night before, put Oct. 22nd - 25th.
- ▶ **Agendas must be attached to the Conference Expense Claim**

Staff member:

Conference title:
(Note: please do not use abbreviations in form)

Date(s):  Location:

Sponsoring group:

Purpose and contribution to Chabot-Las Positas Community College District?
(Please indicate any official position held which requires or makes desirable your attendance)

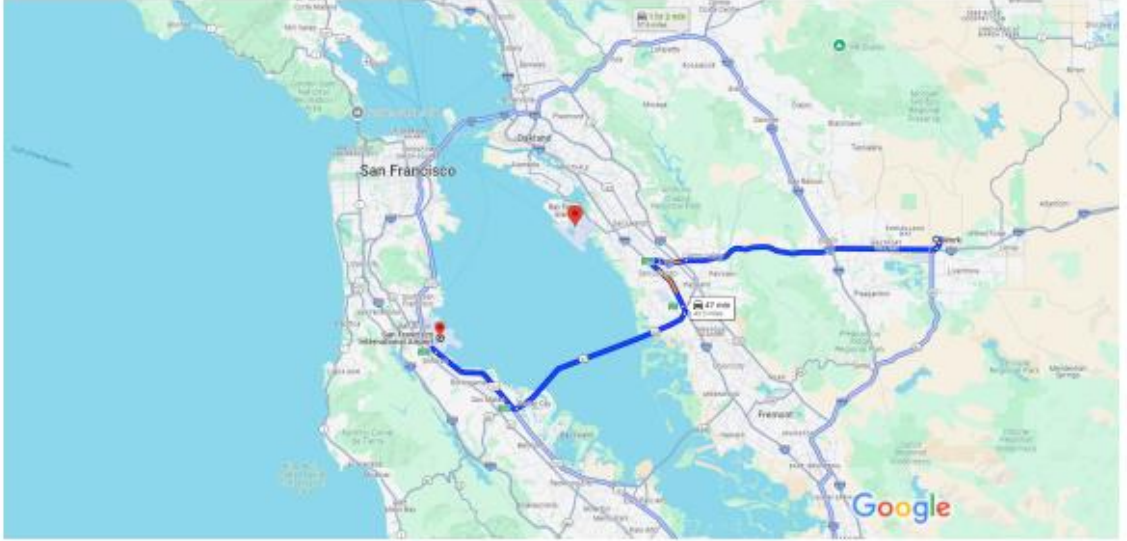
Maps

- ▶ For conference travel or local travel, please only use Google Maps.
- ▶ Print the overall view with multiple route options. Do not print turn-by-turn directions.
- ▶ You are only reimbursed for the shortest distance, not the shortest travel time.





Google Maps

Work (3000 Campus Hill Dr) to San Francisco International Airport

Drive 43.3 miles, 47 min



Map data ©2024 Google 2 mi

 via I-580 W and CA-92 W	47 min
Fastest route, the usual traffic	43.3 miles
 This route has tolls.	
 via US-101 N	1 hr 7 min
	57.0 miles
 via I-680 N	1 hr 2 min
	57.6 miles

Feedback?

- ▶ Feel free to submit anonymous feedback on the survey below
<https://forms.office.com/r/km0vEsYzbC>

