

To all Essex North & Canaan School District Staff:

October 15, 2018

The following is provided to give you written instructions on how to enter a reimbursement request (dental, travel, or tuition) in the iVisions system. As you recall these instructions were provided verbally to you at the Admin Day held 8/27/18.

Login to iVisions from the following links:

Essex North- <https://ivisions.tylertech.com/EssexNorthUnionESS>

Canaan- <https://ivisions.tylertech.com/EssexNorthUnionCanaanESS>

Click Login, enter your user name and password. Login information provided via email at the beginning of this school year. Passwords may not be the same if you have changed them from the default one given.

Home Self Service Pay/Tax Information Human Resources My Workflow Updates

Welcome to the iVisions Employee Self Service Web Portal

Once logged into our site you will have the ability to view and manage many elements of employee information, including your employee profile, benefits enrollment, pay stubs, tax withholding information (W-4), and more. Information is available 24/7 via the secure iVisions Portal.

Employee Link

Click on Self Service, User Defined Forms

User Defined Forms



Dental Reimbursement Form ▼ Create New Form

Dental Reimbursement Form
Travel Reimbursement Form
Tuition Approval Form
Tuition Reimbursement Form

Status
Approved

Choose the form you wish to fill out. Click on Create New Form.

Fill out all of the required fields that pertain to your reimbursement.

For any reimbursements that require a receipt, you will have to scan all documentation together in 1 file to attach to the reimbursement form. For example: To create a travel reimbursement form including mileage, lodging, and meals all backup documentation must be scanned in one file. The mapquest or google maps showing the total miles driven is required for mileage. A copy of the lodging receipt showing the rates and payment method is required for all lodging reimbursement. Meals require the following 1.) Itemized Receipt detailing what was purchased and total due AND 2.) Proof of payment such as the credit card receipt or have the server or cashier initial, date, and write that it was PD in Cash. Reimbursement Requests will be denied if the above information is not provided.

To have files attached as one document. **(Elem Copier)** Bring them to the scanner and use the Option "Job Build". Choose your email address in the address folder. You can use the feeder and the flatbed glass surface together to scan or just use one or the other. As you add documents hit the Start button. Only hit start more than once if you are using both the feeder and flatbed glass surface. Then hit OK to start sending. This will email you the documents. Download the emailed file to your computer. You will need to find the document to attach to this reimbursement request as explained below. **(HS Copier)** Documents that can be scanned through the document feeder will be placed there, use the Image Send Function and choose your email address. If you have some documents to scan using the flatbed glass surface also DO NOT hit Read-End. Place documents on the flatbed and hit scan again until you are finished. Hit Read-End once all documents to be attached are scanned. Please see Jeff if you have any questions regarding scanning and emailing.

To attach a document:

Click Browse

Find the document on your computer to attach. Choose the file and hit Open.

You will see the name of the document listed below the Browse button. This means the document is attached.

Examples are on the next two pages:

Greater Cincinnati Northern
Kentucky International Airport
Operated By Standard Parking

Fee Computer Number:	12
Cashier:	FITZGERALD Id #106
Transaction Number:	35836
Entered:	11/09/2013 06:44
Exited:	11/14/2013 20:00
Ticket #12313	Dispenser #14
Lot:	Lot 2
Area:	Area 2
Rate:	VarRate 2
Parking Fee:	\$ 48.00
AAA Discount Long Term(6)	-\$ 6.00
Subtotal	\$ 42.00
Total Fee:	\$ 42.00
Mastercard	\$ 42.00
Credit Card Number:	*****XXXX
Total Paid:	\$ 42.00

Thank You
For Comments or Questions
Call 859-767-3105

Callouts:
1) Business: Greater Cincinnati Northern Kentucky International Airport
2) Date: 11/09/2013 06:44
3) Item Purchased: Parking Fee
4) Price of Item: \$ 48.00
5) Amount of Bill: \$ 42.00
6) Method of Payment: Mastercard

EXAMPLE 1:

Example 1 shows what was purchased and method of payment.

Welcome to Mel's	
Check #: 0001	12/20/11
Server: Josh F	4:38 PM
Table: 7/1	Guests: 2

2 Beef Burgr (@9.95/ea)	19.90
SIDE: Fries	
1 Bud Light	3.79
1 Bud	4.50

Sub-total	28.19
Sales Tax	2.50
TOTAL	30.69

Balance Due	30.69
Thank you for your patronage!	

This receipt does not show how the bill was paid. Notice how it still says "balance due".

This receipt has alcohol on it. Per UC policy, we are not able to reimburse alcohol expenses. The Bud and Bud Light along with the taxes associated would be deducted from the amount to be reimbursed.

EXAMPLE 2:

Example 2 is the itemized receipt which shows what was purchased, however there is no proof of payment. Plus alcohol is not permitted for reimbursement. Alcohol and unapproved expenses must be manually deducted from receipt prior to request for reimbursement.

RUSS BUILDING PARLINE
235 MONTGOMERY ST
SAN FRANCISCO CA 941
(415) 421-5358

BATCH: 025
S-A-L-E-S D-R-A-F-T
72279895
430132215711145

REF: 0888
CD TYPE: VISA
TR TYPE: PURCHASE
DATE: MAY 19, 09 16:10:36

TOTAL \$8.50

ACCT: 9806 EXP: **/**
AP: 012315
NAME: DAVID M ROE

CARDMEMBER ACKNOWLEDGES RECEIPT OF GOODS AND/OR SERVICES IN THE AMOUNT OF THE TOTAL SHOWN HEREON AND AGREES TO PERFORM THE OBLIGATIONS SET FORTH BY THE CARDMEMBER'S AGREEMENT WITH THE ISSUER

THANK YOU

CUSTOMER COPY

This receipt doesn't show what was purchased.

EXAMPLE 3:

Example 3 is only a proof of payment. It does not show what items were purchased.

Once all fields are completed and the proper documentation is attached, you can click on Save or Submit.

Save will not send it for Approval and payment. Save will allow you to return to the document at a later time and complete. If you have completed it and are ready to submit. Click Submit.

It will show you on the User Defined Forms main screen the document and the next approver if it has been submitted. Otherwise, it will not have a name listed under the Approver section. This means you have not submitted the document.

To submit all open forms for approval and payment, choose Submit Open Forms. All forms in the grid will be submitted for approval if they are Open. It will not submit reimbursements a second time if this has already been done.

Please continue to the next page if you are submitting a reimbursement to be paid from Federal grant funds. (Perkins, CFP to include Title I, Title II, Title IV, SWP, IDEA-B, FFV, School Lunch Program)

Purchases made from Federal Grant Funds:

If you are requesting any kind of reimbursement to be made from a Federal Grant you must also attach the following:

Procurement Form for Lodging, Conference Registration, Meals, Supplies (if applicable).

Essex North Supervisory Union/CANAAN SCHOOLS
Procurement Documentation Form

For purchases made with Federal funds

Vendor Name: _____ Fiscal Year: _____

Description and purpose of the purchase: _____

Procurement Method (check one): *see procurement procedure for additional details on the methods of procurement*

- Micro-Purchase (\$0 - \$10,000) (Can only use Micro purchase if vendor will only be used once per grant per year.)
- Small Purchase (\$0 - \$250,000) (Must use this option if you are purchasing from this vendor more than once per grant per year.)
- Sealed Bid
- Competitive Proposal
- Non-Competitive Proposal (if selected, indicate reason why below)
 - The item is available only from a single source
 - A public emergency
 - Received authorization from pass-through entity (AOE)
 - Competition is determined to be inadequate (after solicitation)

If the purchase is over \$15,000, contact the Business Office to ensure the VT Bid Law is followed.

Reasons for selecting the vendor (check all that apply): *does not apply to micro-purchase method*

- Lowest price Availability Accessibility
- Expertise Reputation Continuity of Services
- Location (venue) Bid process/State contract

