

CTSA PD Processing Instructions

1. Review Guidelines:

- Read Procedure 5008P for requesting funds: <https://bsd405.org/wp-content/pdf/policy/5008P.pdf>, section VII, Page 17
- All use of PD funds must have preapproval. An employee, may not request use of these funds after payment has been made or you are enrolled for a class or conference.

2. Complete PD Form

- The fillable form can be found at this link:
- <https://bsd405.sharepoint.com/sites/humanresources/Shared%20Documents/Training%20and%20PD/Prior%20approval%20form%20-%20fillable.pdf>
- Complete the CTSA PD Request before enrolling or making any payment on the class or conference.
- If you will miss work, complete travel prior approval which you can get from accounting. An employee must follow all District requirements for travel.
- If you register or pay for the class or conference prior to getting approval, your claim will not be approved.

3. Attach these items to the PD form:

- Description of Class or conference
- Attachment that shows cost of class or conference

4. Approval:

- Send the CTSA PD form and attachment to your Director for approval.

5. Final Approval:

- Once your director approves, send approved packet to HR via email for final District approval
- If any piece of the above steps is missing, the document will be sent back to employee and process will be stopped.

6. Processing Time:

- Up to 10 business days

7. CTSA PD Form is sent back to employee via email:

- Final approved document will be sent back to employee via email
- Employee may now register for class or conference

8. Payment:

- Employee should use District or Department Credit Card or Purchase Order for payment
- Discuss payment options with your Administrative Support person
- Make sure the payment net report comes to HR for final approval via email
- Attach complete PD packet to Paynet report or Purchase order for audit tracking