

PROFESSIONAL LEAVE/SUBSTITUTES REPORTING FORM
Explanation of Form Items

1. **Tracking No.** – This is the number assigned to the Professional Leave/Teacher Release Form (PL/SRF) by the Funding Source Director. A tracking number will be assigned to a PL/SRF when a substitute is needed for any one or all of the employees attending the professional development activity.
 - (a) If the PL/SRF is initiated by a recommendation to the Principal/School from the Funding Source Director, the Tracking No. will be assigned before the Form is sent to Principal.
 - (b) If the PL/SRF is initiated by the Principals/School, then the number will be assigned when it is received for the first time by the Funding Source Director.
 - (c) This number should be placed at the **top of this form and on any attachment.**
2. **School/Location** - Enter the School or Location of the employee(s) participating in the Professional Development activity.
3. **Workshop/Conference/Activity** – Enter the name of the workshop or meeting the employee(s) will be attending. **Activity Location** - Enter location of workshop, conference, meeting or activity.
4. **Purpose/of Activity** – Describe the activity or the goal of the activity as professional development.
5. **Dates of Activity** – Enter the dates the activity will take place.
6. **Leave Duration** - Specify the amount of leave the employee(s) will need in number of days or portion of a day.
7. **Provide Estimated Cost if Not Initiated or Recommended by Funding Source Director** – If other costs are to be submitted for reimbursement, provide an estimate of the cost of this activity.
8. **Students Traveling?** Indicate whether students will be traveling with the employees. Circle “YES” or “NO.”
9. **If Yes – Number of Students Traveling** - If the answer to #8 was Yes, provide the number of students traveling.
10. **Funding Source** – Check the source of funding for this professional leave activity. If the specific funding source (grant) is not listed, check “Other Grant” and specify the name of the funding source. ***If there are **NO COSTS** whatsoever associated with the Professional Leave, **there is no need to route this form** to a funding source director.
11. **Employees Attending –Substitutes Needed?**– Identify **ALL** employees attending the activity by (a) Name, (b) Employee ID, (c) position, and (d) subject area. If this is not known, as is sometimes the case when the Funding Source Director is preparing the PL/SRF as a recommendation to the Principal, the “Explanation/Comments” line can be

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used to provide instructions to Principals for selecting staff and limitations on the number of staff. (e) Indicate for **each** employee whether a substitute is needed or not.

Please **NOTE**:

(a) **Only one form per activity** needs to be submitted. If more than 5 employees are attending please attach a list of the additional employees or add an additional line on the form.

(b) **There is no need to provide the Substitute's name.** It is important, however, to **make sure the employee's leave and substitute's name is correctly entered into AESOP.**

(c)

12. Estimated Cost of Substitute(s) if needed: - Calculate estimated substitute costs by multiplying Total Number of Subs needed X Number of Days X \$64.00 (salaries and benefits per sub).

13. To be completed by FUNDING SOURCE DIRECTOR ONLY – This section will be completed by the Funding Source Director when the Director receives the signed form from the Principal.

(a) If the Funding Source Director agrees to fund "OTHER COSTS" of the activity, the Director will circle "Approved." If the Director **does not agree** to pay for OTHER COSTS, the Director will circle "Denied." (If there are **No Other Costs** then the Director will circle "N/A.") In all cases, the Director will sign the form and return a copy to the School/Location.

(b) If the Funding Source Director agrees to fund "SUBSTITUTE COSTS" associated with the activity, the Director will (1) circle "Approved," and (2) enter the general ledger code to be used by Payroll for coding the substitute's pay. If the Director **does not agree** to pay for the substitute costs, the Director will circle "Denied" (If **Substitutes are not needed** for any one of the attendees then the Director will circle "N/A.") In all cases, the Director will sign the form and return a copy to the School/Location.

NOTE: The School should **never** enter the general ledger account code for the substitute pay, unless the Principal is also the Funding Source Director of a School Grant such as a Charter School Grant. **This information will be provided directly to Payroll by the Funding Source Director.**

14. Principal/Supervisor Approval and Date – The date and signature of the Principal or Supervisor should be placed here. The signature indicates that the Principal or Supervisor has agreed to release the staff for the specific professional development on the dates indicated.

15. Copy to be returned to Principal by Funding Source Director – When the final form has been signed by the Funding Source Director (see #10.). A copy of the completed form will be returned to the Principal.

PROFESSIONAL LEAVE / SUBSTITUTES REPORTING FORM

For Payroll Use Only
PR Run ID _____

1. Tracking No. _____

(To be assigned by Funding Source Director if a substitute is required)

2. SCHOOL/LOCATION _____

3. Workshop/Conference/Activity _____ Activity Location _____

4. Purpose(Description) of Activity _____

5. Dates of Activity _____ 6. Leave Duration: Portion of Day: 1 .75 .50 .25
OR
of Days: 1 2 3 4 5

7. Provide OTHER Estimated Costs if Activity not Initiated by Funding Source Director:

Registration: _____ Meals: # of meals _____ X # days _____
Lodging(# of nights _____) _____ Mileage: # miles _____ X .55 cents/mile _____

TOTAL Estimated Other Costs: \$ _____

8. Students Traveling? (circle one) **YES** **NO** 9. If Yes - Number of students traveling _____

10. Funding Source: _____ Staff Dev (Curriculum) _____ Title I-Regular _____ CTAE
(check one) _____ Title II A (Curriculum) _____ Title I-Sch Imp _____ WIA
_____ Title II D (Curriculum) _____ Title I-Dist Sch _____ Athletics-Gen Fund (Seabrooks)
_____ Title III (Curriculum) _____ Title IV(S&DF-Turner) _____ Music & Art
_____ Read Frst(Curriculum) _____ Charter School Grant _____ Sch Princpl-(Acctng)= _____
_____ MSP(Curriculum) _____ ESP/Fed Flowthrh _____ Other Grant= _____

11. Employees Attending - Substitutes Needed? Explanation/Comments (optional) _____

Employee Name	ID#	Position	Subject Area	Substitute Needed?	
_____	_____	TEACHER - PARA	_____	YES	NO
_____	_____	TEACHER - PARA	_____	YES	NO
_____	_____	TEACHER - PARA	_____	YES	NO
_____	_____	TEACHER - PARA	_____	YES	NO
_____	_____	TEACHER - PARA	_____	YES	NO

12. Estimated Cost of Substitute(s) if needed: # of Subs _____ X # of days _____ x \$64.00/day(sal&ben)= \$ _____

*****To be completed by FUNDING SOURCE DIRECTOR ONLY*****

13.

Funding request for OTHER COSTS:	DENIED	APPROVED	N/A
Funding request for SUBSTITUTE(S)	DENIED	APPROVED	N/A
Funding Source Director _____ <i>Signature</i>	Date _____		
Account Number for Substitute: _____			

14. Principal/Supervisor Approval: _____ Date: _____
Signature

15. *****Copy to be returned to Principal by Funding Source Director***** FIN-F016, Rev. A, 11-Feb-09

Instructions for HOW TO USE the “PROFESSIONAL LEAVE / SUBSTITUTES REPORTING FORM”

What is the purpose of this PL/SRF form? The purpose of this form is to provide a uniform means for Principals to request funding for Professional Leave Activities and to provide an efficient process for the communication of the substitute general ledger account code to the Payroll office.

What is the main difference in this form and the old “Substitute for Teacher Release Form”? The main difference is that this form does **NOT** report the Substitute’s name. This form provides documented information about the professional development activity, the employees participating in the activity, and whether or not any of those employees need a substitute. This is information that the Funding Source Directors need to make a decision about the proper funding. **If any one of the participating employees needs a substitute**, the form will be tagged with a **Tracking No.** by the Funding Source Director and the substitute general ledger account code will be entered on the form. All forms tagged with a Tracking No. will be forwarded to the Payroll office by the Funding Source Director.

Why is the name of the substitute not needed on this form? AESOP will provide Payroll with the name of the substitute that has been attached to the Teacher’s or Para’s Leave transaction. That is why it is important that this information be correctly entered into AESOP in a timely manner. Therefore, as long as the PL/SRF provides Payroll with the date(s) of the professional leave, the name of teacher(s) or Para(s) attending, and the associated substitute account code, Payroll can locate the assigned substitute from the information downloaded from AESOP and change the account code for the assigned substitute.

Who will provide the account code for substitute pay when substitutes are needed? The general ledger account code for the substitute pay will be entered By the Funding Source Director when the Director receives the PL/SRF and approves the funding for activity. The Director will also tag the form with a Tracking No. and then forward the form directly to the Payroll office.

What is the purpose of the Tracking No.? This number will identify the Forms that need to be forwarded to the Payroll office by the Funding Source Directors.

This Tracking No. will also be used to track **CHANGES** that need to be reported to Payroll after the original form has been submitted. For instance, at the last minute one of the employees reported on the original PL/SRF becomes ill and is unable to attend the activity. A replacement employee is selected to attend. This change needs to be reported to Payroll. In this instance the School should:

- (1) obtain a “CHANGE to Tracking No. _____” form;
- (2) enter the Tracking No assigned to the original PL/SRF;
- (3) complete Items 2 through 6 as appear on original PL/SRF;
- (4) show the change **FROM** the original employee **TO** the replacement employee;
- (5) and forward the “CHANGE” to the Funding Source Director.

The Funding Source Director will then approve the change, enter the account code for the substitute pay and forward the **CHANGE** form to the Payroll office.

NOTE: **CHANGES** may also include **deletions and additions**.

Who should initiate the preparation of this form?

If initiated by the Principal:

If the Principal wishes to obtain funding (either **OTHER COSTS** or **SUBSTITUTE COSTS**) for a professional leave activity, the School will:

- (1) complete Items 2 through 12 (If the funding source is not listed, check “Other” and specify the name of the funding source or grant, etc.
- (2) sign the form; and
- (3) forward the form to the Funding Source Director that was checked at Item #10.

Once the Funding Source Director receives the form from the Principal, the Funding Source Director will APPROVE or DENY funding for OTHER COSTS and/or SUBSTITUTE COSTS. If SUBSTITUTE COSTS are approved, **the form will be assigned a Tracking No.** If substitutes are NOT needed, a Tracking No. will NOT be assigned. The Funding Source Director will then sign and date the form, enter an account number for the substitute's pay (if substitute needed) and return a copy of the form to the School/Location.

If initiated by the Funding Source Director:

If a Funding Source Director wishes to recommend a professional development activity to a Principal, the Funding Source Director will:

- (1) complete Items 2 through 10;
- (2) list the names of employees recommended (or provide criteria for the selection of employees);
- (3) check the appropriate funding source; and
- (4) send the PL/SRF form to the Principal for approval.

If the Principal approves the activity and the release of the employees, the principal should:

- (1) complete any missing information at Item #9- Employees Attending-Substitutes Needed?;
- (2) sign and date the form; and
- (3) return the form to the Funding Source Director.

If the Principal approves the activity **but wishes to change an employee**, the Principal should sign the original PL/SRF form and complete a "CHANGES to Tracking No. _____" form. If a "Tracking No." was assigned to the original form by the Funding Source Director (which means at least one of the employees needed a substitute), this number should be entered in the heading of the CHANGES. The **CHANGES form should be attached to original PL/SRF**. Both forms should then be returned to the Funding Source Director.

Once the Funding Source Director receives the returned PL/SRF form and CHANGES (if attached), the Funding Source Director will:

- (1) indicate whether the activity is approved or denied for OTHER COSTS and/or SUBSTITUTE COSTS,
- (2) sign the form;
- (3) enter the account code for the associated substitute pay (if substitutes are needed); and
- (4) return a signed copy of the form to the School/Principal.

When should this form be prepared and submitted to the Funding Source Director? This form should be submitted to the Funding Source Director a minimum of three to four weeks prior to the professional development activity.

For the process to work effectively, the PL/SRF forms must be received by the Payroll office according to the Payroll Reporting Schedule, the same reporting schedule that applies to the deadlines for entering leave and substitutes into AESOP. This Reporting Schedule can be found in the Salary Guide. For instance, if a teacher participated in a professional development activity on January 30, 2009, the professional leave and associated substitute pay would fall within the Payroll Leave/Additional Comp. Reporting Period of January 16 – January 30, according to the FY 2009 Salary Guide. Therefore, all forms for activities occurring during the period January 16 to January 30 should be forward to the Payroll office by the Funding Source Directors no later than January 7, 2009.

When should changes to the employees attending be submitted to the Funding Source Director? CHANGES should be transmitted to the Funding Source Director on the same day the change is known in order for the PL/SRF to reach the Payroll office by the payroll processing deadline.

Should the school send the PL/SRF directly to Payroll? The only time a school would send the PL/SRF form directly to payroll is when the school's Principal is the Funding Source Director for a specific School Grant that will fund the activity such as a Charter School Grant. (**Note:** If the Principal wishes to use the school's **Title I allocation to fund and activity**, the PL/SRF should be sent to **Title I's Funding Source Director** for approval and substitute account coding. The Title I office will forward the PL/SRF directly to Payroll.)