

# Petaluma High School

## Professional Development Pre-Approval Process

*This process can take up to three weeks. Please plan accordingly.*

1. Email Principal requesting approval to attend the conference.
  - a. State purpose of attending conference.
  - b. Attach conference website link and include date, time, location, names of attendees, estimated cost and comps that are included such as meals included or parking vouchers.
2. Verify with the Finance Office that this conference takes purchase orders.
  - a. If they do not, request from the vendor to send communication that they do not accept PO's. Once it is received, email the Principal to request pre-approval for an Expense Reimbursement and review the [Employee Reimbursement Guidelines](#).
  - b. If yes, review the [PHS Purchase Order \(PO\) Process](#) and complete the [PHS Purchase Order \(PO\) Requisition Form](#).
3. Complete the [Travel & Conference \(T&C\) Application](#) form and review the [Travel & Conference Application and Reimbursement Checklist](#). Return the T&C Application form with applicable documents from the Checklist to the Finance Office.
4. The Finance Office will verify available funds, have the Principal review documents for approval, and send the approved forms to the D.O. for review and an additional approval.
5. Once the conference is approved, you will receive notification to register. Please forward the registration confirmation to the Finance Office.
6. After the conference, complete and submit the [Travel & Conference Expense Reimbursement Form-Rev 01/24](#) and original receipts to the Finance Office *no later than ten days after the last day of the conference.*
7. Reimbursement check will be mailed to address on file at D.O.

*Please contact the Finance Coordinator, Veronica Leach, with any questions at [vleach@petk12.org](mailto:vleach@petk12.org) or (707) 778-4655.*