Local Travel Reimbursement

Finance Service Center - Travel Unit

718-935-5000 Option 4

Travelunit@schools.nyc.gov

January 2024

NYC Department of Education

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What is TRAC?

TRAC replaces all the previously used Travel and Conference forms:

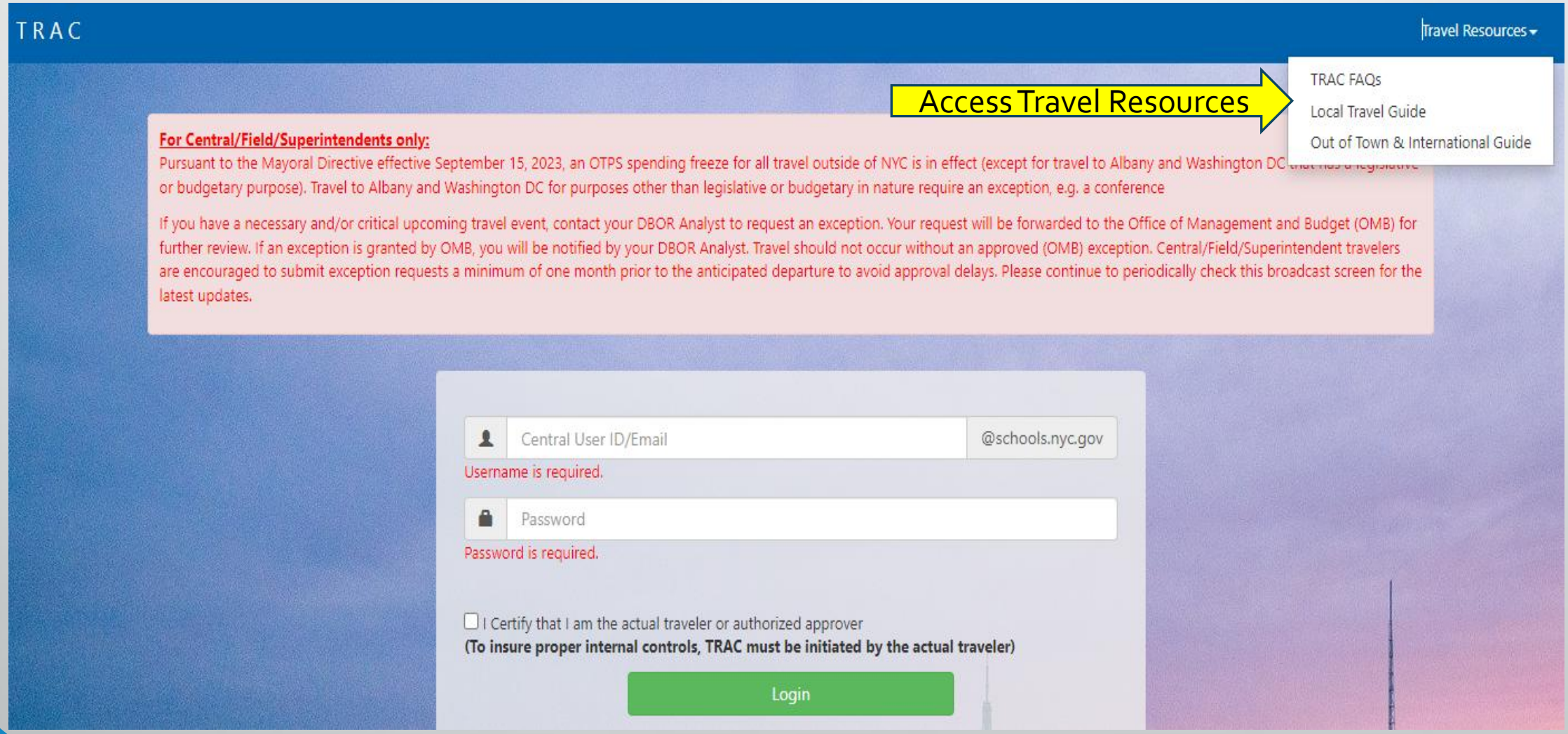
- Application to attend meeting, conference or convention outside of NYC- OP221
- Authorization to use personal car
- Small item payment process (SIPP)
- The TRAC, however, does not replace the travel related expenses paid for by Non-Government Entities Form https://infohub.nyced.org/docs/default-source/doe-employees-only/travel-related-expenses-paid-for-by-non-government-entities.pdf Which must be used when a non-governmental entity offers to pay for or defray the cost of official activities engaged in by DOE employees.
- Travelers are asked to review all of the rules and regulations governing travel on official DOE business by reading the Standard Operating Procedures (SOP) chapter on Travel and Conferences. https://infohub.nyced.org/nyc-doe-topics/Policies/travel-and-conferences
- TRAC Link https://vendor.finance360.org/standalone/famapp/trac/login.aspx

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Traveler's Responsibility

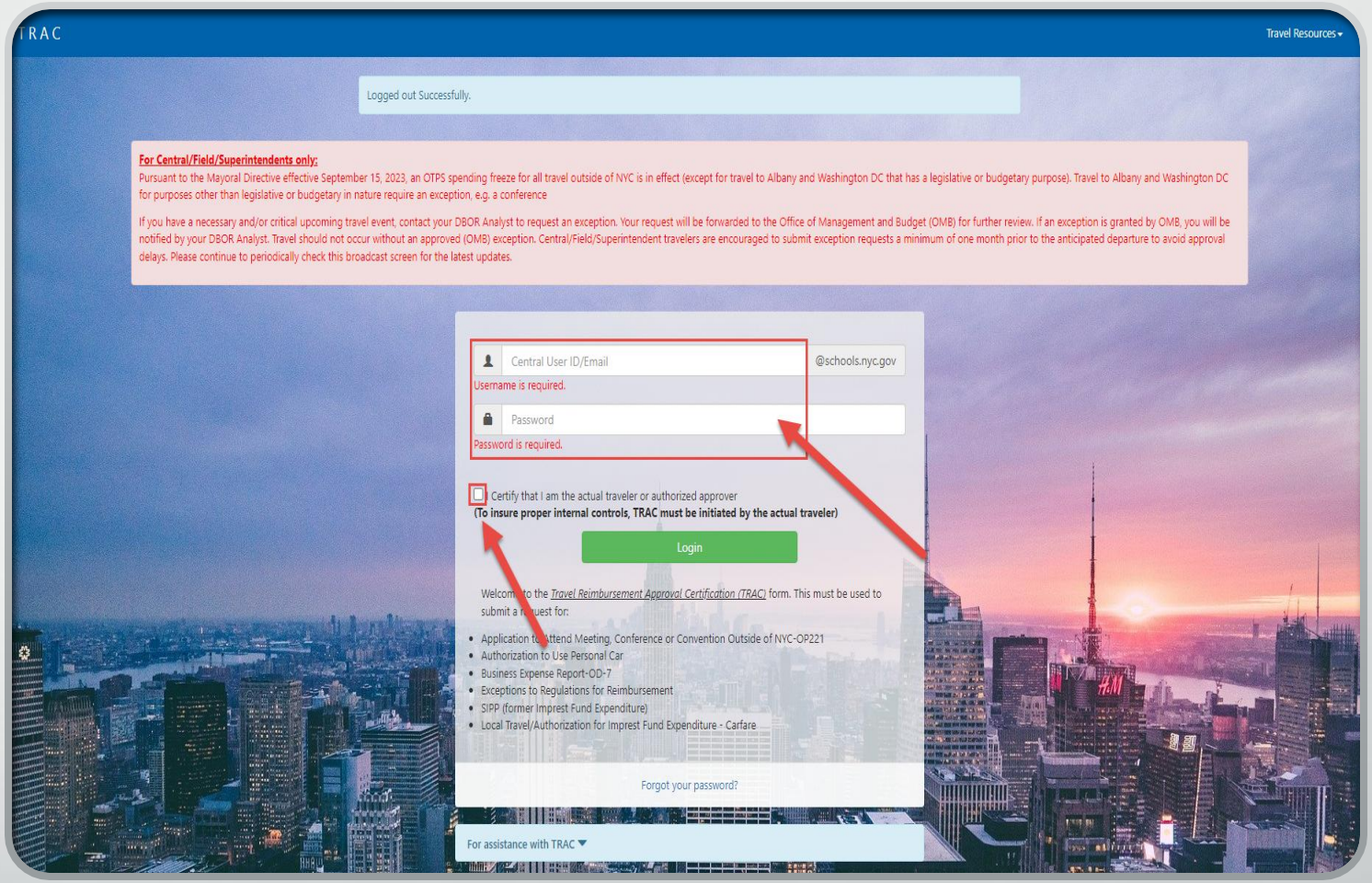
- Travelers must comply with the DOE rules and regulations as stated in the SOP.
- Local travel is defined as all travel within, or to a destination within, the boundaries of New York City.
- Local travel via public transportation does not require approval in the TRAC system.
- Local travel using the traveler's personal vehicle – Traveler will need to submit a request for use of private vehicle (CAR request) via TRAC.
- CAR request must be submitted prior to using your personal vehicle for DOE business.
- Approved CAR requests are good for 30-31 days. A new request must be completed for each 30-31-day cycle.

TRAVEL RESOURCES



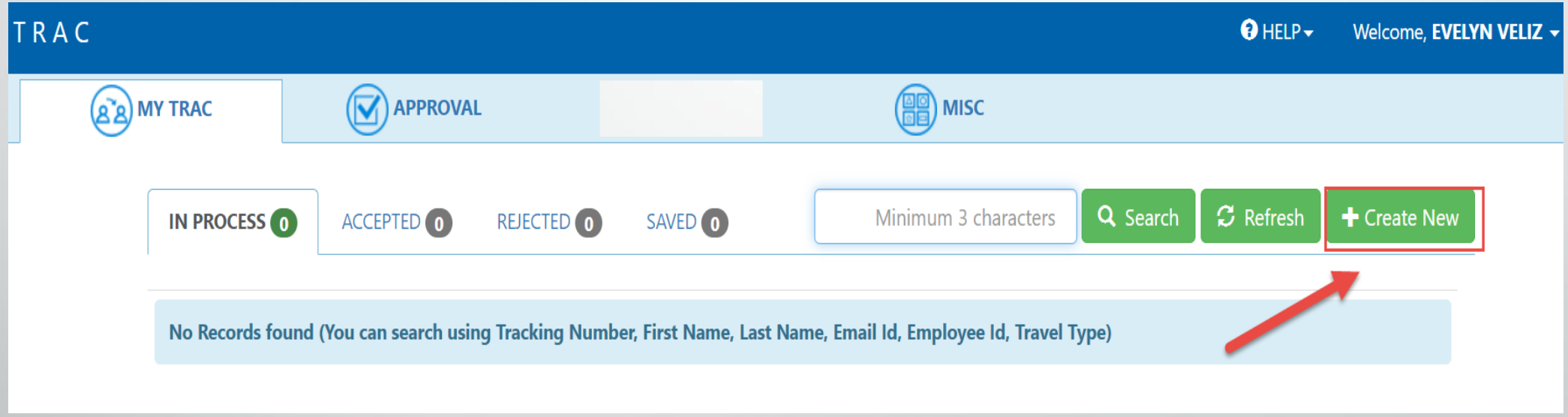
Logging into TRAC to submit a CAR request

All DOE employees with a DOE email have access TRAC. Enter your DOE Outlook credentials to access the TRAC system. You will need to also check the I certify that I am the traveler box.



CAR Request

Once logged into the TRAC system you will select "create new".

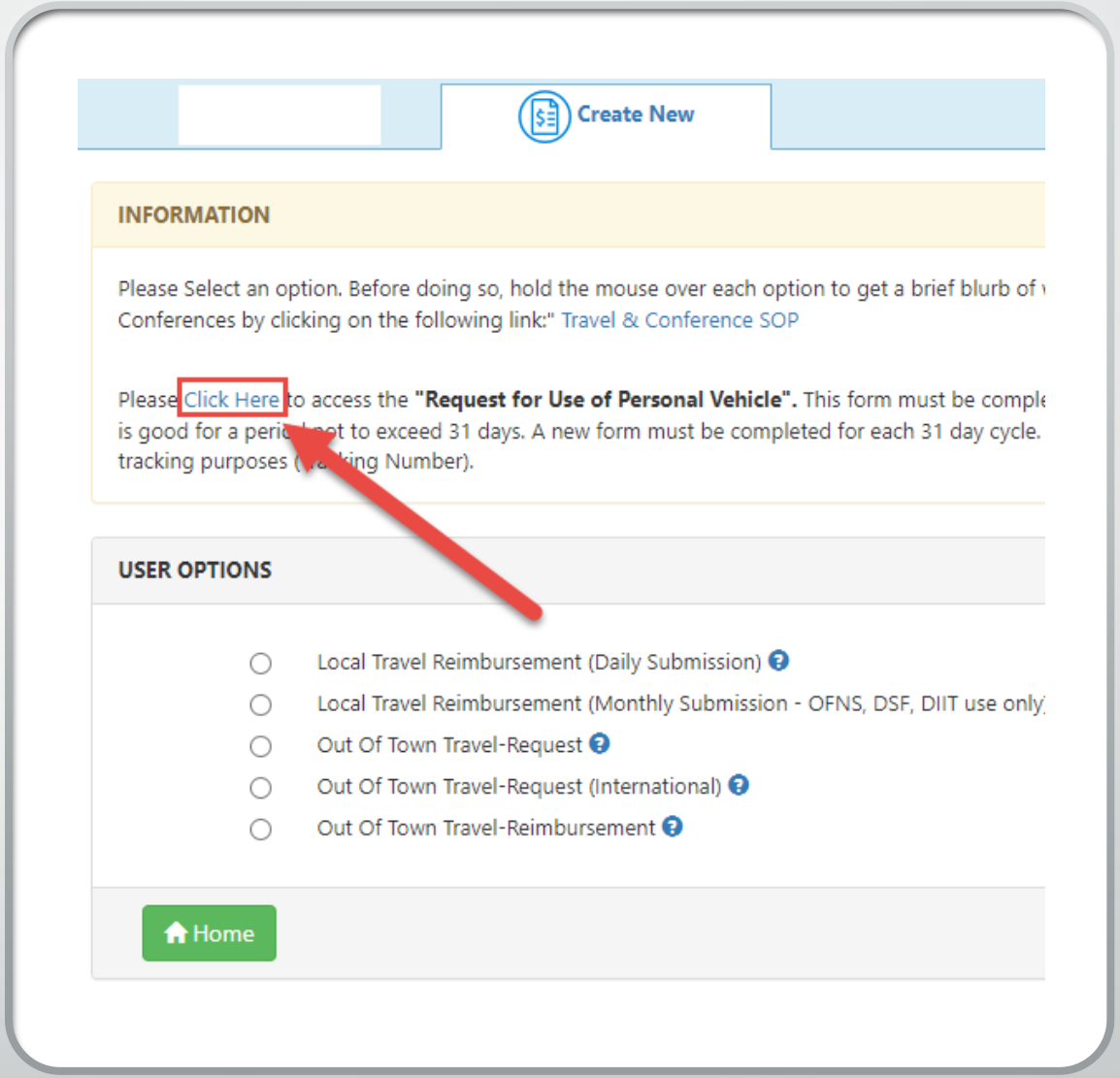


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CAR Request Submission

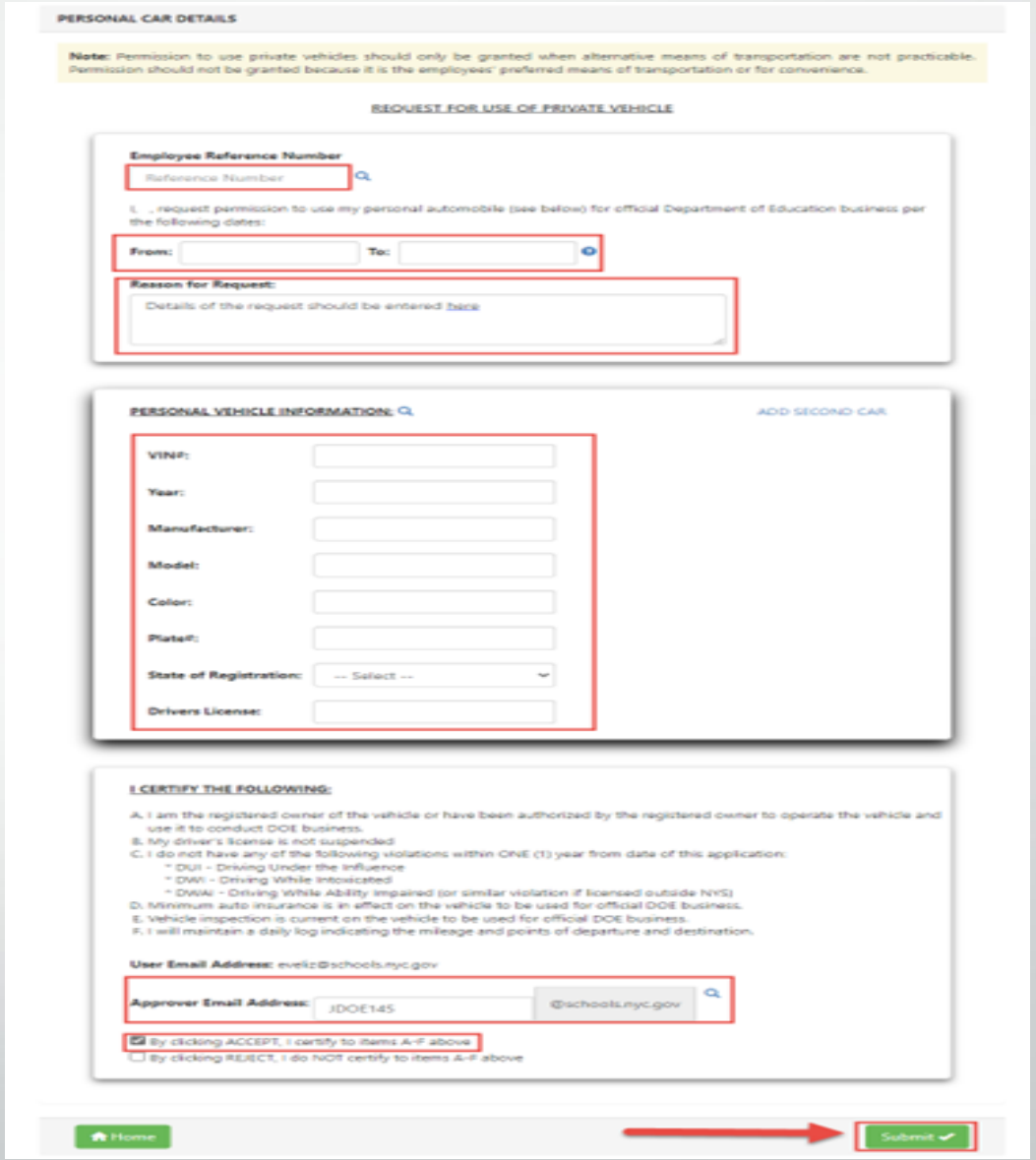
On the create new page you will select the "click here" option to request to use your car.

Please note that CAR requests should be submitted 30-31 days prior to the usage of vehicle for travel.



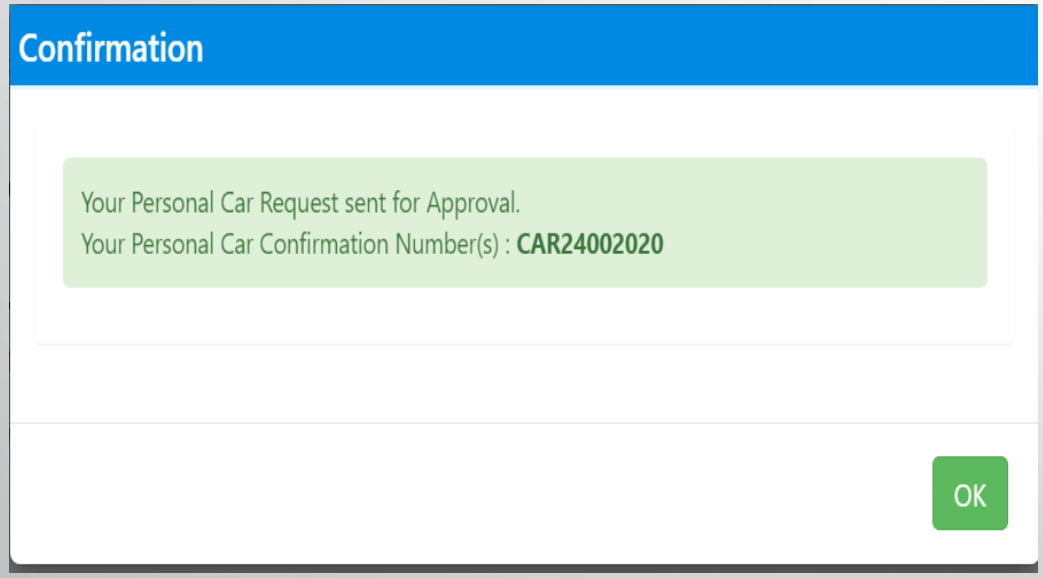
CAR Request Submission

You will need to complete this form if you intend to use your personal vehicle for official DOE business. All pertinent fields must be filled out.

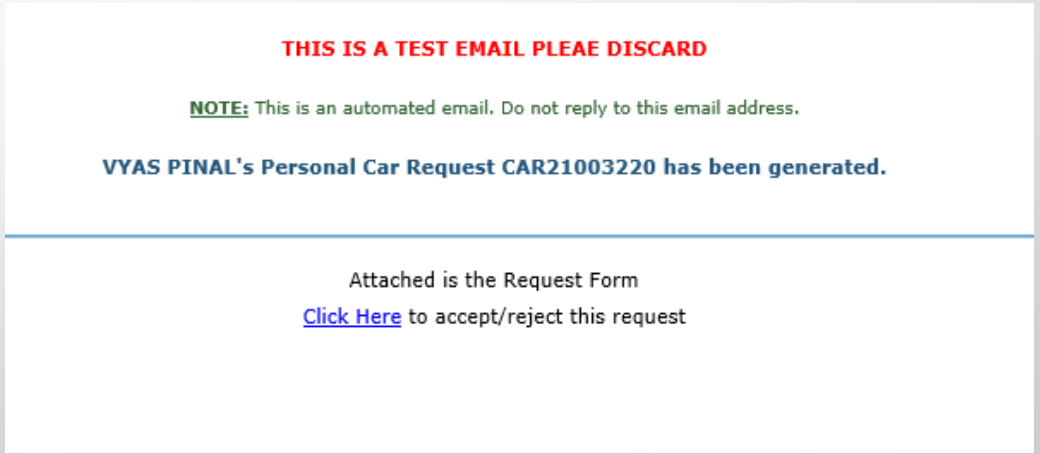


CAR Request- Submission for Approval

When a CAR request is submitted you will receive a CAR number.



Once you complete a CAR request you will receive an email stating that the CAR request was received and sent for approval.

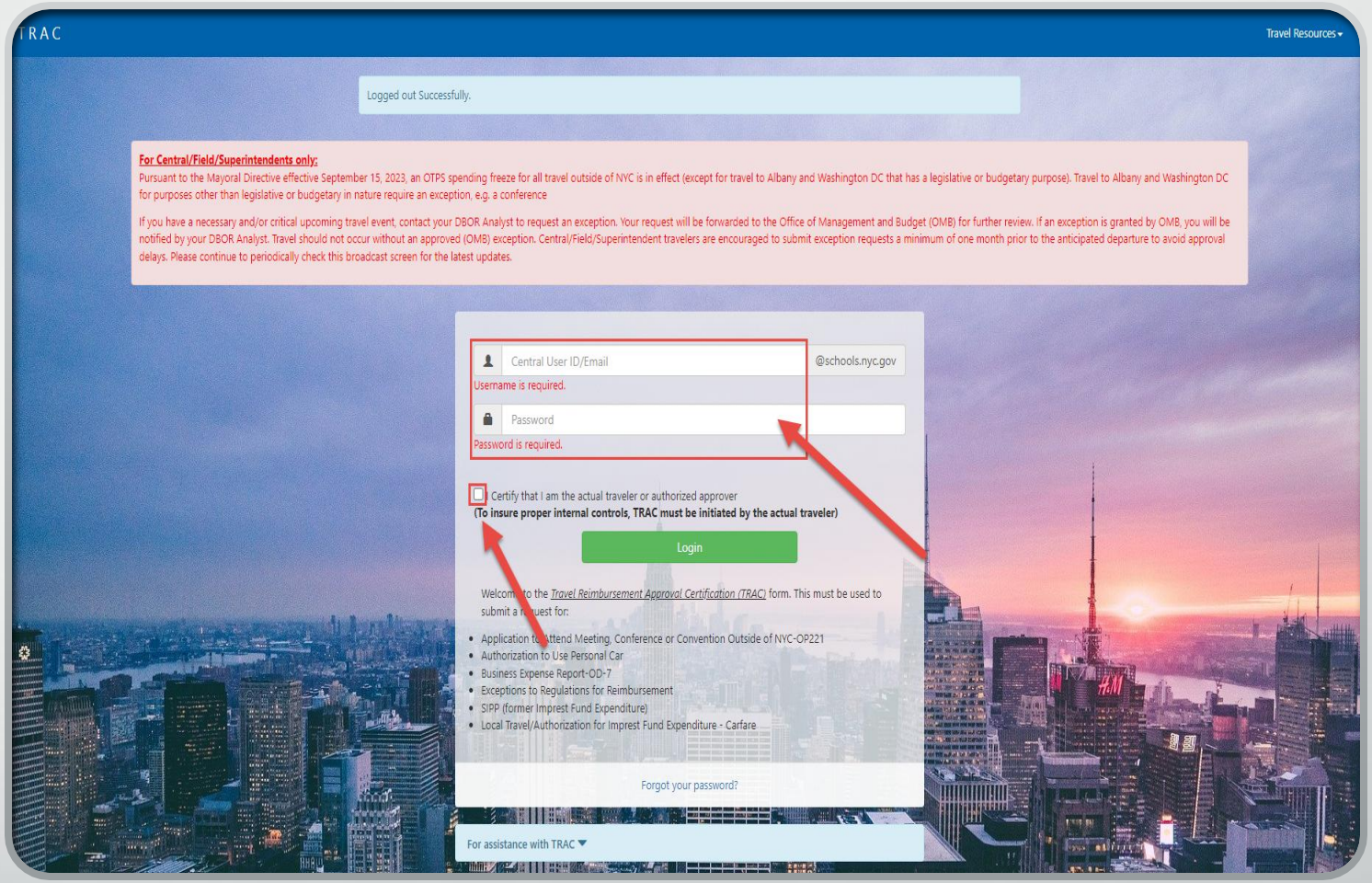


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LOCAL TRAVEL REIMBURSEMENT SUBMISSION (DAILY SUBMISSION)

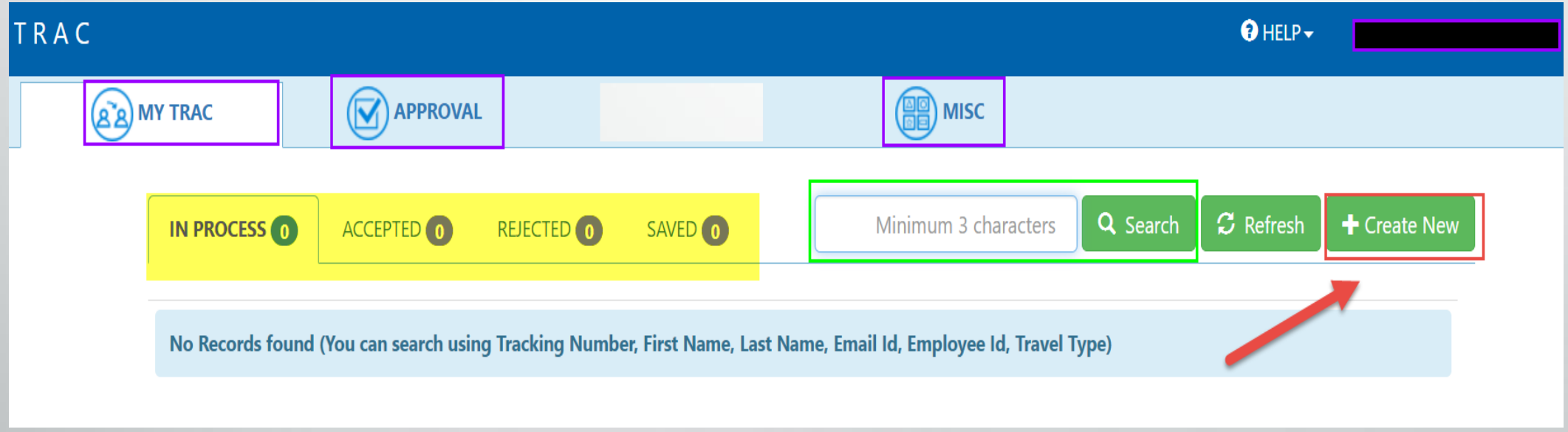
Logging into TRAC

All DOE employees with a DOE email have access TRAC. Enter your DOE Outlook credentials to access the TRAC system. You will need to also check the I certify that I am the traveler box.



My TRAC Screen

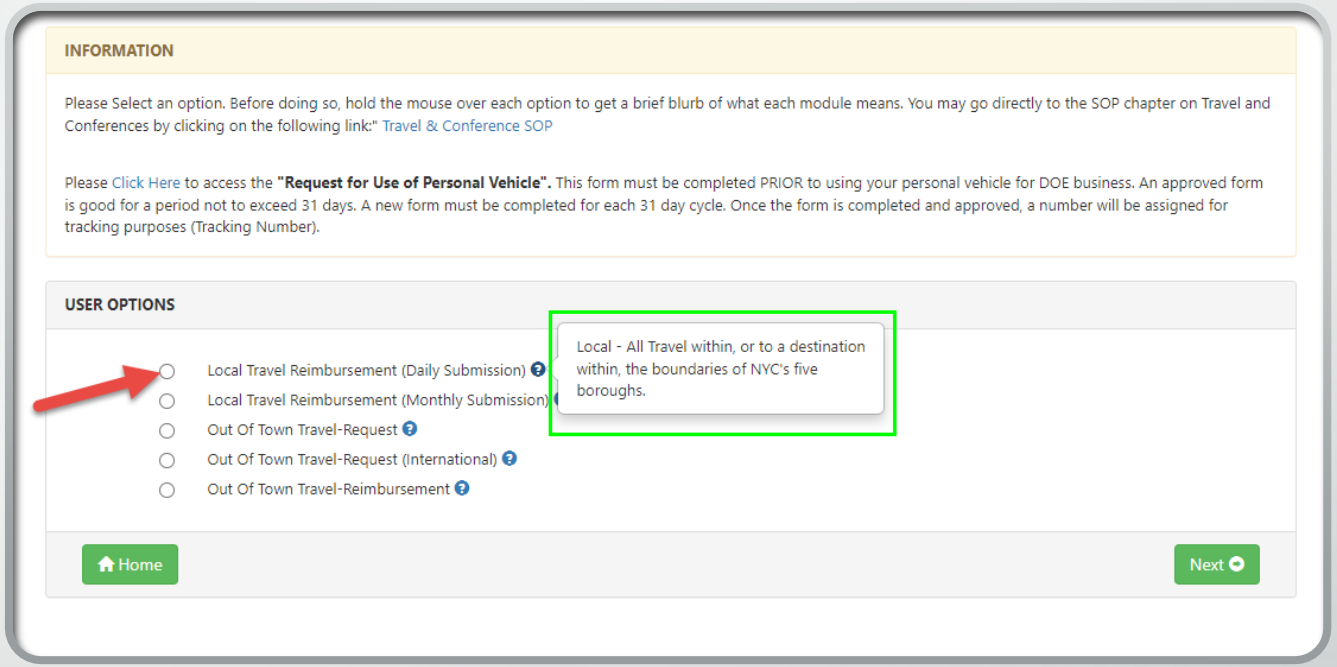
In the 'My TRAC' section you can view the status of all the TRACS you submitted. To create a new Local Travel Reimbursement, click 'Create New'. You also have the ability to search by tracking number, name, email, Financial District, employee ID or travel type.



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Local Travel Reimbursement/Daily Submission

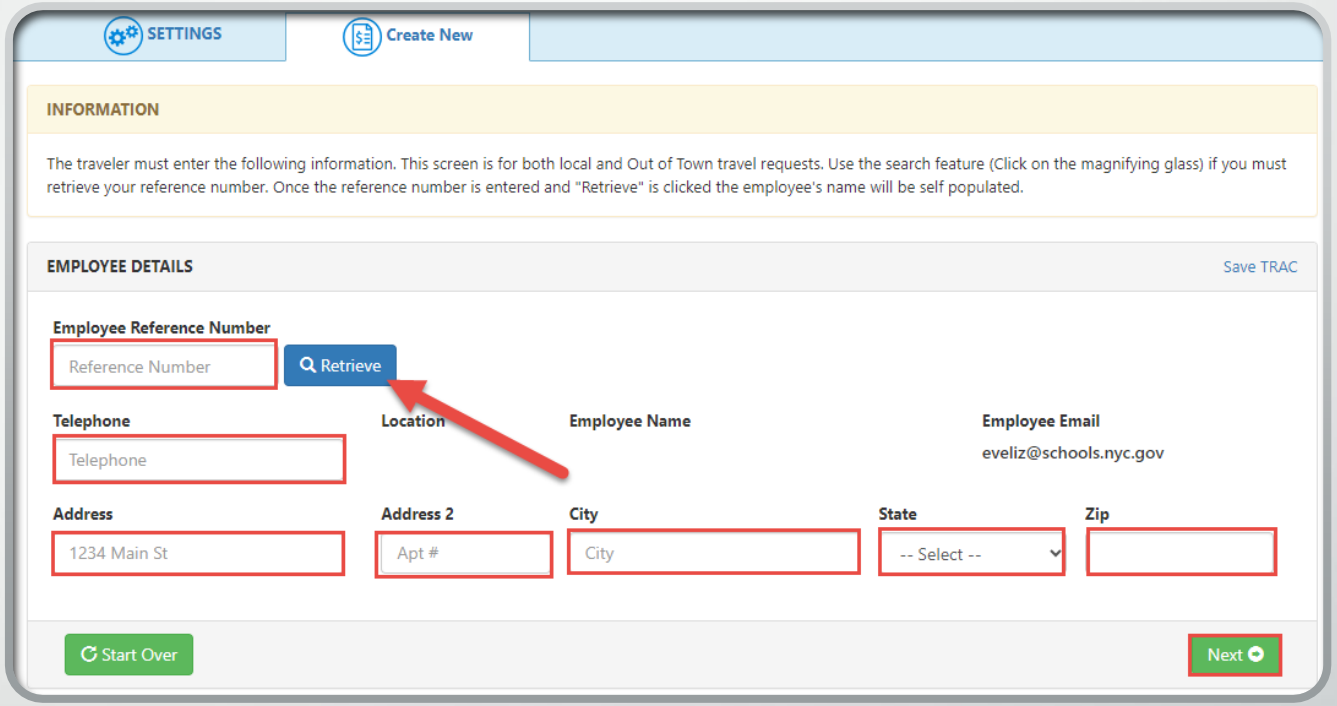
After clicking 'Create New', please select the option for Local Travel Reimbursement (Daily Submission).



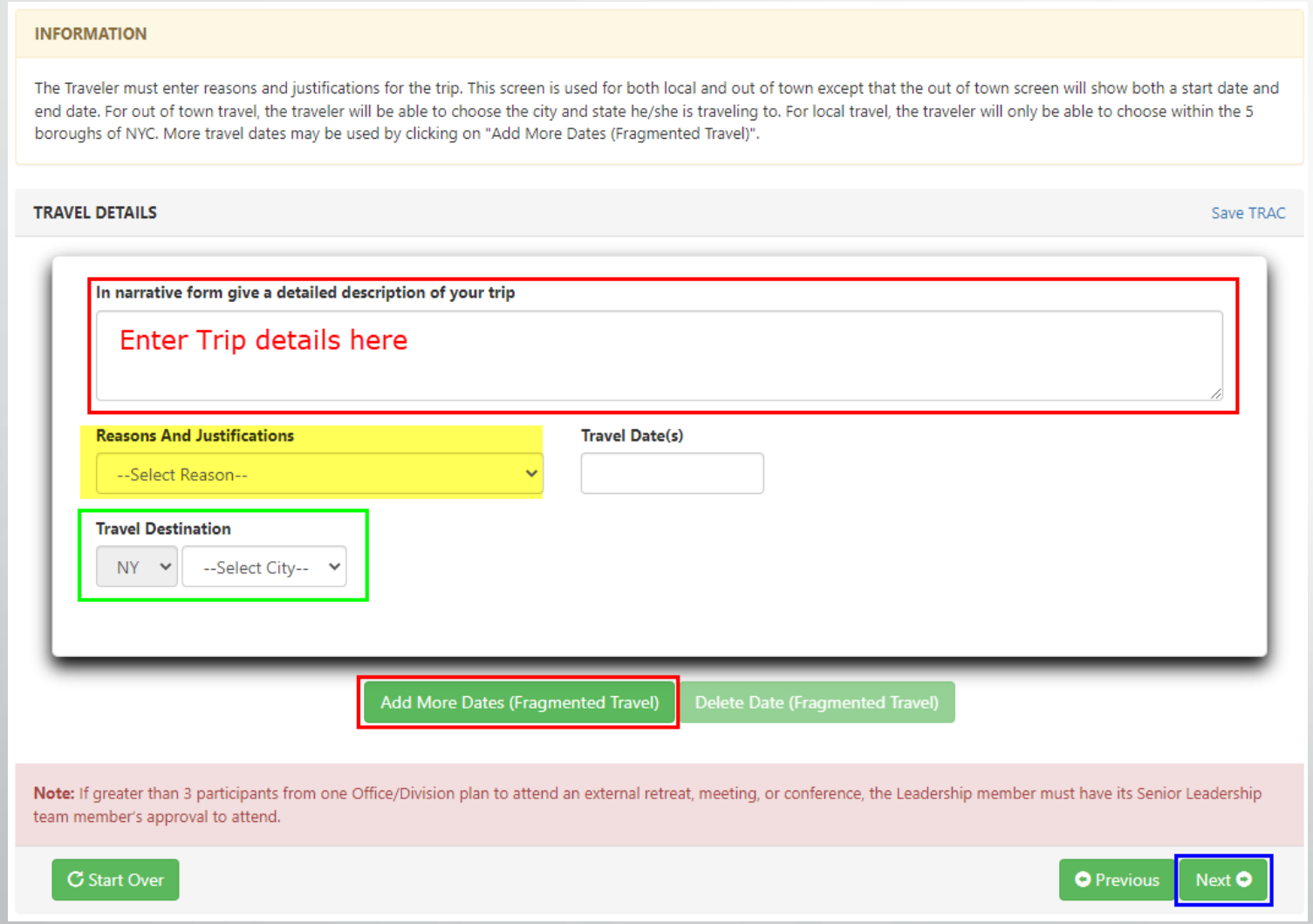
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Employee Details

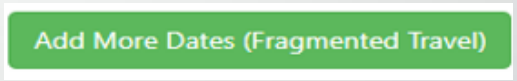
Enter your DOE Employee ID, telephone number and address details, then click Next.



Travel Details



You now need to enter all the trip details. This includes the date of local travel and a detailed description of the trip. You must select a reason for travel from the dropdown, as well as the borough of your destination. If there are more dates of travel, then you can select



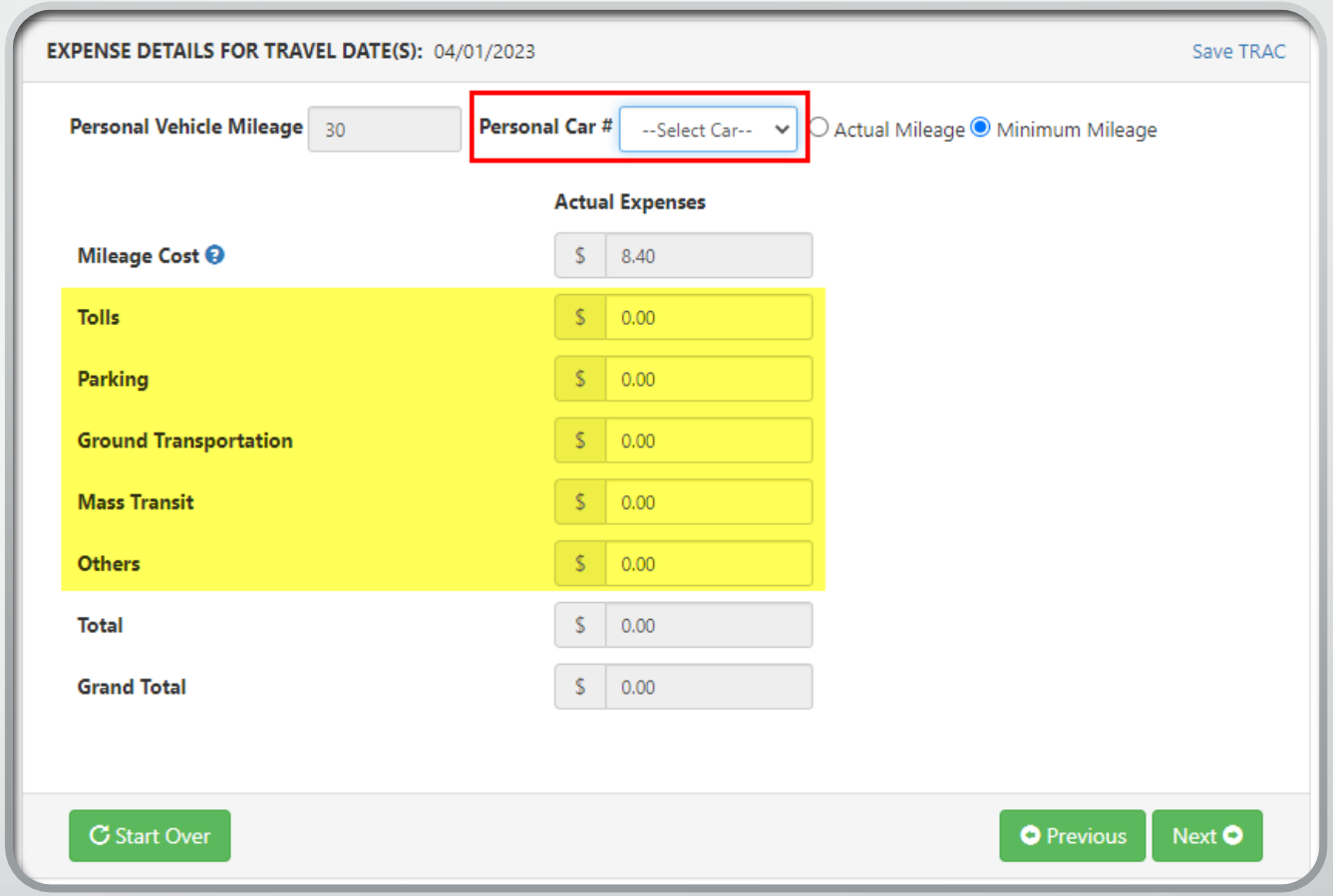
Once you have entered all the dates and details for <u>each</u> date of travel, click  to proceed.

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Expense Details

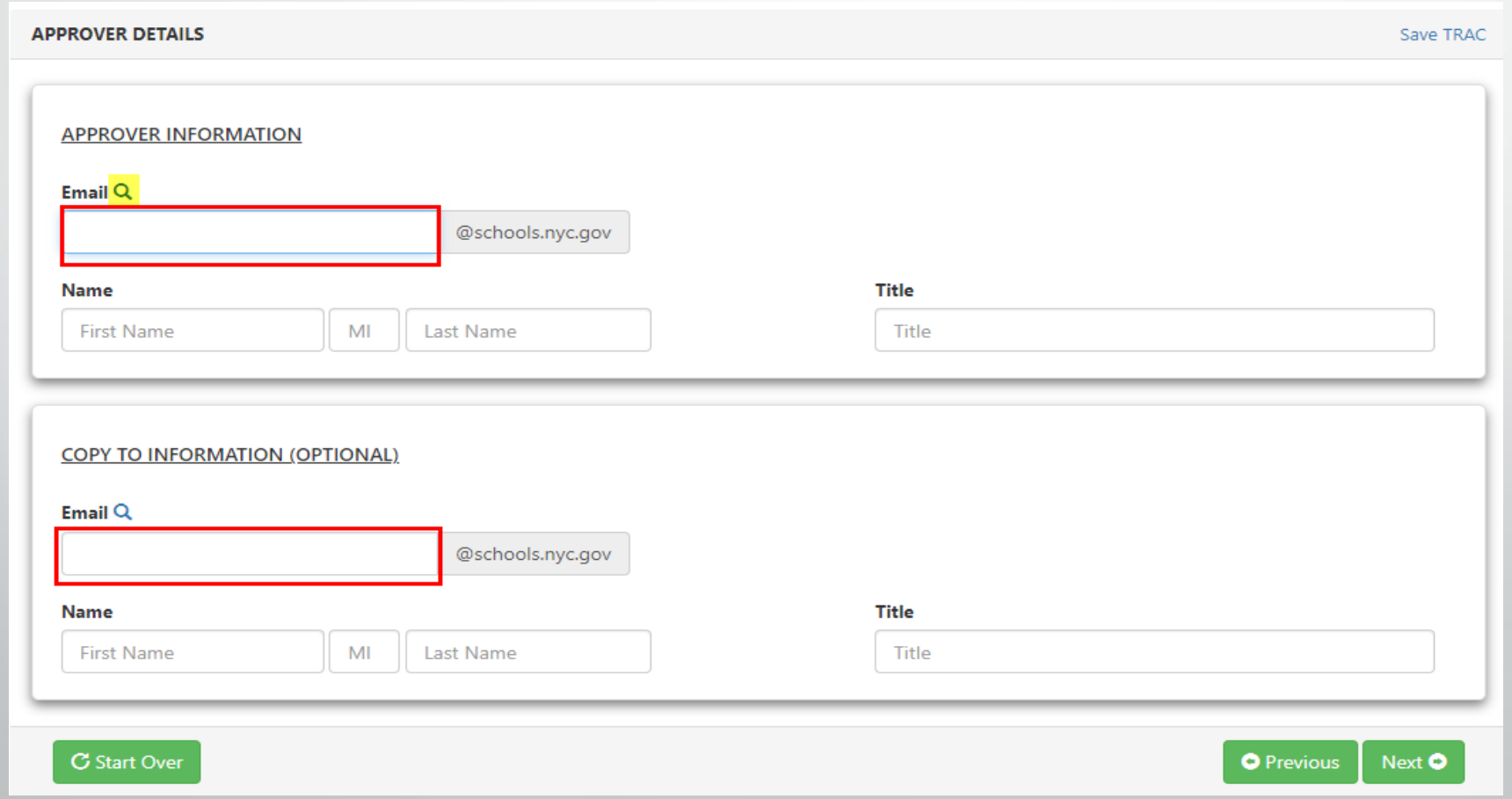
If a personal car was used, then a CAR Request should have been submitted and approved prior to travel. All approved CAR requests will populate in a dropdown for selection. Select Actual or Minimum mileage.

Enter all other relevant travel related expenses incurred, then click Next.



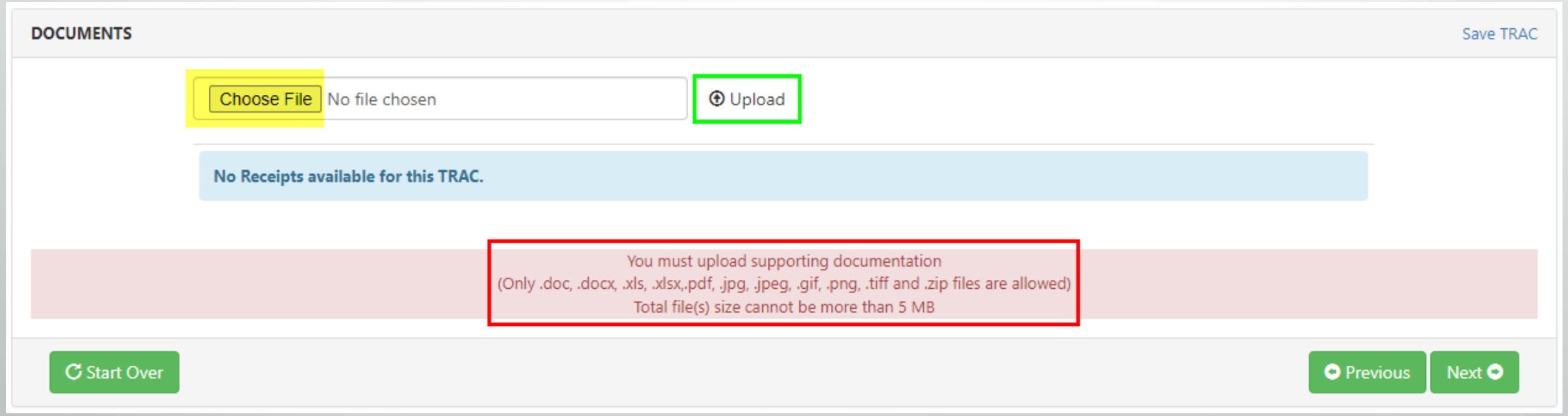
Approver Details

You will enter your approver's email address, without the @schools.nyc.gov (ex: jsmith). You will enter an email address in the 'Copy To' section (person will receive a copy of this request). Once the email is entered, the approver's name and title will auto-populate. If you are unsure of the email address, please click the magnifying glass to search by name. Click Next when finished.



Documentation Upload

Supporting documentation is required to submit a TRAC (ex: receipts for tolls or parking). Click 'Choose File' to search for documents on your computer to upload. Once a document is selected click Upload. Please note the accepted document types and the maximum file size. After uploading documentation, click Next.

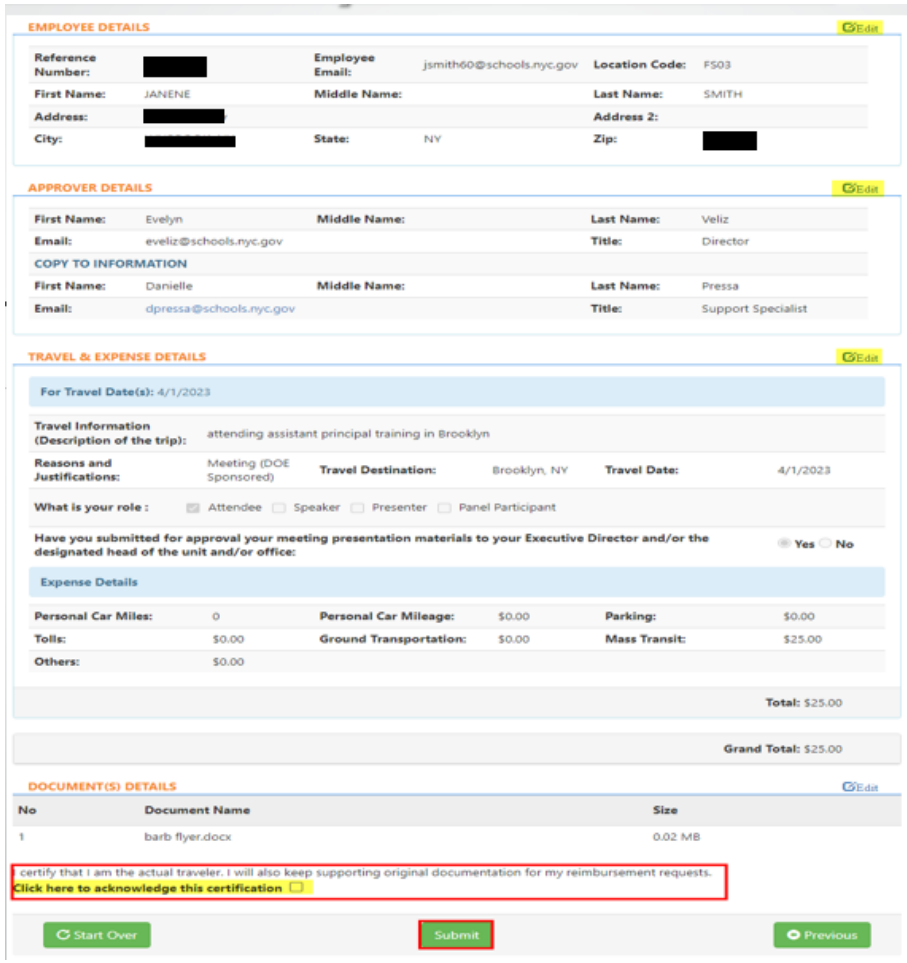


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Confirm and Certify TRAC Details

Review all trip details. If anything is incorrect, please click Edit on that section to go back and correct.

If all entered information is correct, then please select the checkbox certifying you are the traveler and click 'Submit'.



EMPLOYEE DETAILS — Edit

Reference Number:	[redacted]	Employee Email:	jsmith60@schools.nyc.gov	Location Code:	FS03
First Name:	JANENE	Middle Name:		Last Name:	SMITH
Address:	[redacted]			Address 2:	
City:	[redacted]	State:	NY	Zip:	[redacted]

APPROVER DETAILS — Edit

First Name:	Evelyn	Middle Name:		Last Name:	Veliz
Email:	eveliz@schools.nyc.gov			Title:	Director

COPY TO INFORMATION

First Name:	Danielle	Middle Name:		Last Name:	Pressa
Email:	dpressa@schools.nyc.gov			Title:	Support Specialist

TRAVEL & EXPENSE DETAILS — Edit

For Travel Date(s): 4/1/2023

Travel Information (Description of the trip):	attending assistant principal training in Brooklyn				
Reasons and Justifications:	Meeting (DOE Sponsored)	Travel Destination:	Brooklyn, NY	Travel Date:	4/1/2023

What is your role : ☑ Attendee ☐ Speaker ☐ Presenter ☐ Panel Participant

Have you submitted for approval your meeting presentation materials to your Executive Director and/or the designated head of the unit and/or office: ◉ Yes ○ No

Expense Details

Personal Car Miles:	0	Personal Car Mileage:	$0.00	Parking:	$0.00
Tolls:	$0.00	Ground Transportation:	$0.00	Mass Transit:	$25.00
Others:	$0.00				

Total: $25.00

Grand Total: $25.00

DOCUMENT(S) DETAILS — Edit

No	Document Name	Size
1	barb flyer.docx	0.02 MB

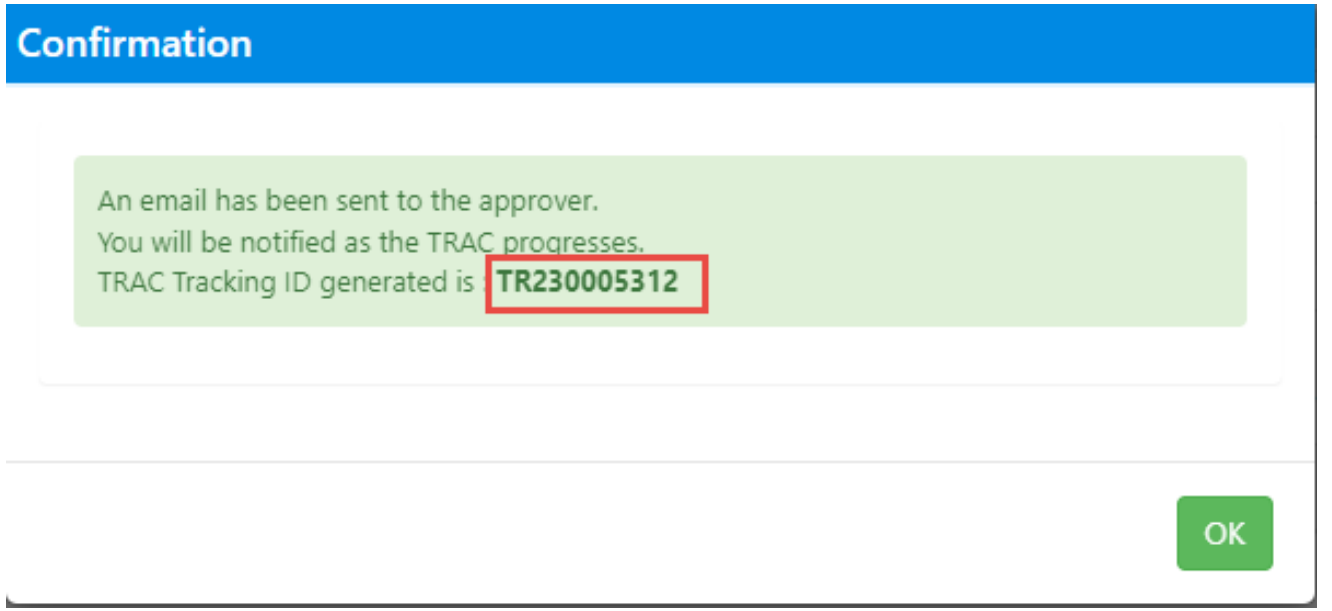
I certify that I am the actual traveler. I will also keep supporting original documentation for my reimbursement requests.
Click here to acknowledge this certification ☐

Start Over | Submit | Previous

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TRAC Progress

Once you submit your TRAC a 'TR' document number will be generated, and an approval email will be sent to your approver.



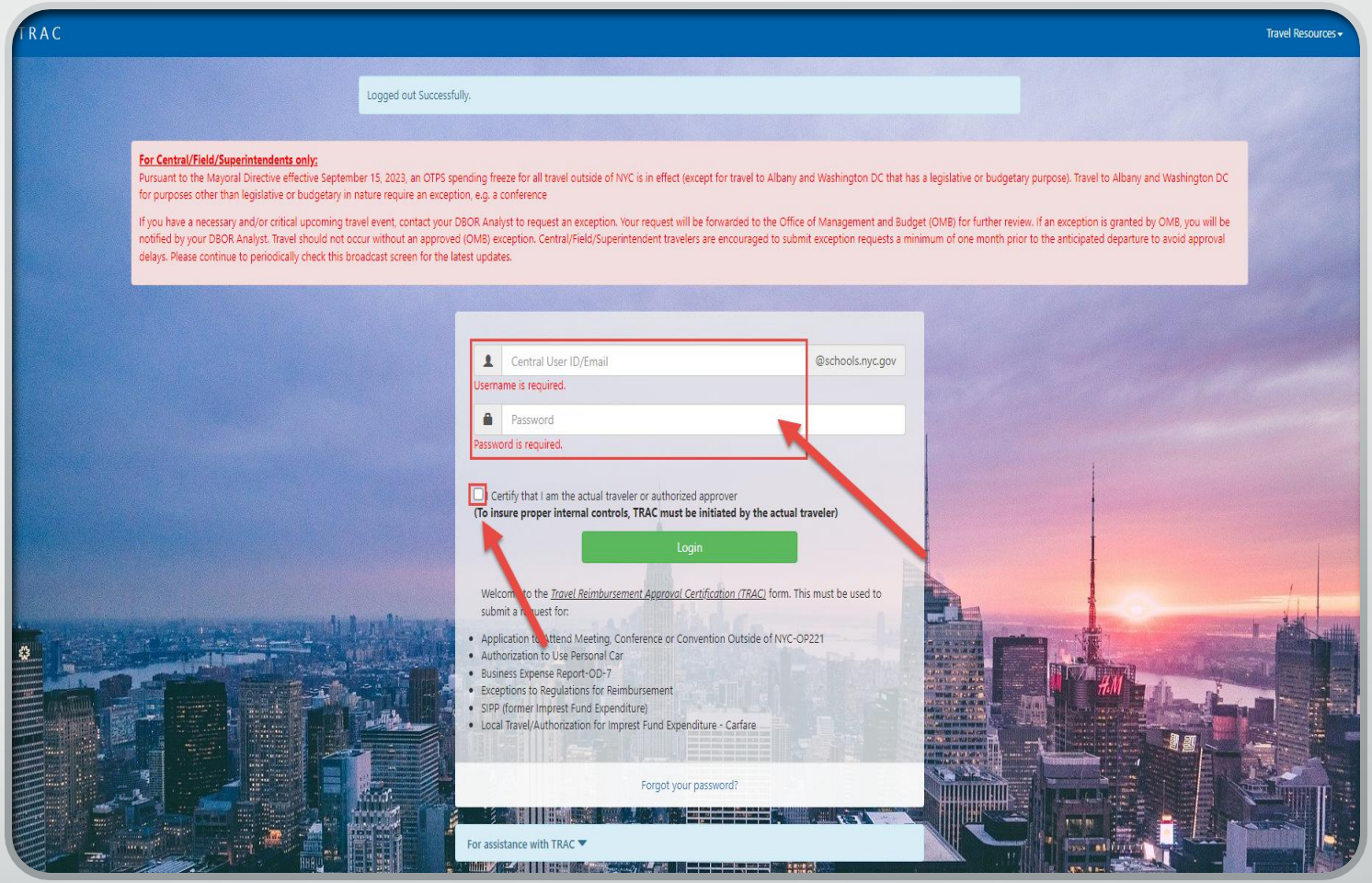
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Local Travel Reimbursement (Monthly submission)

Used only for staff who conduct daily site visits to multiple locations on the same day

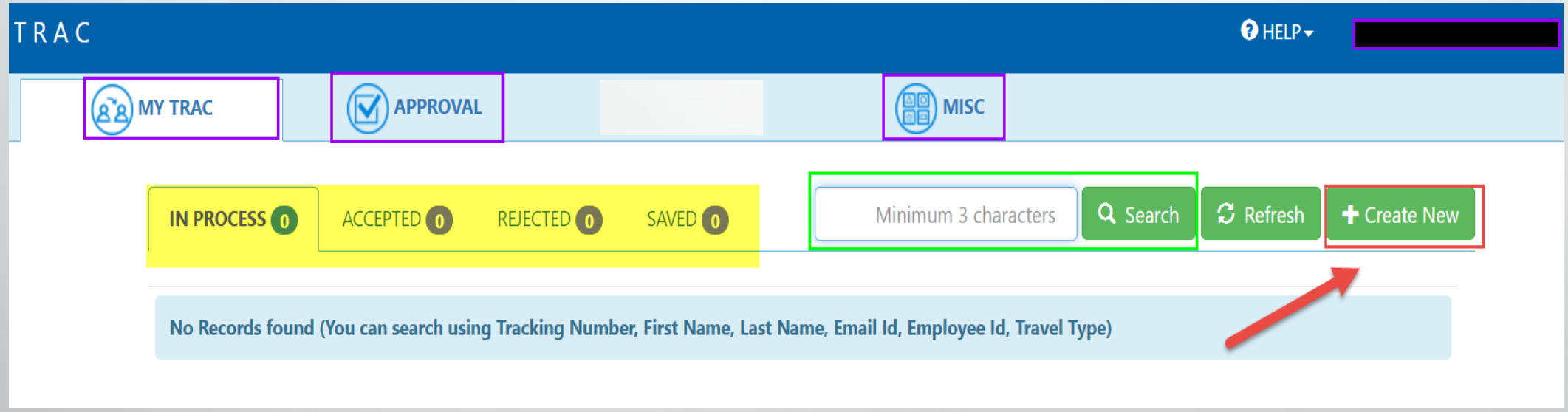
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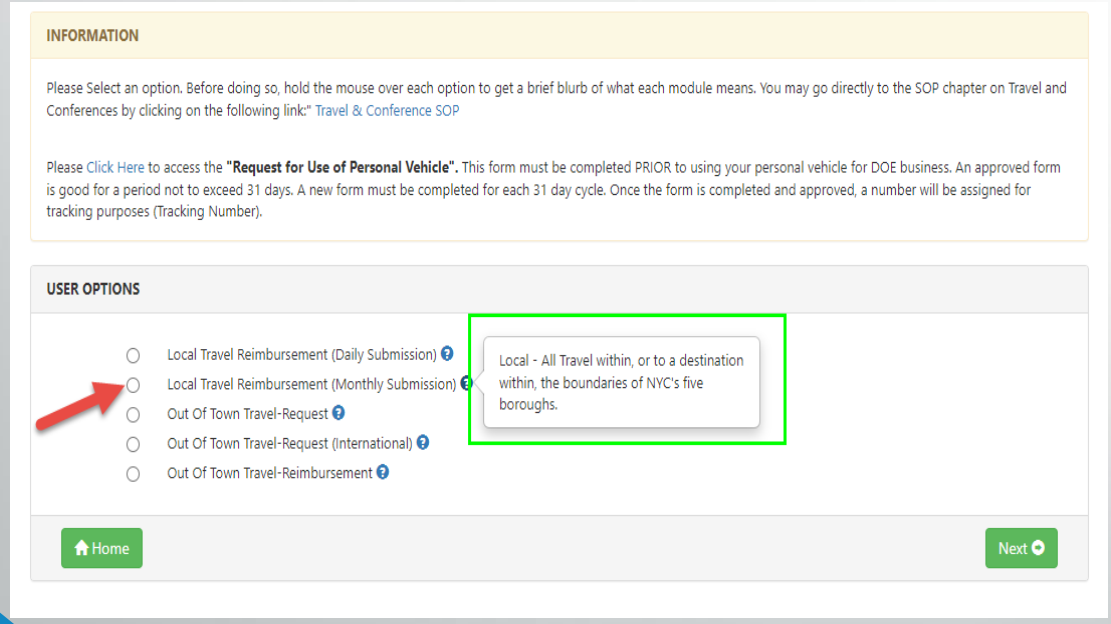
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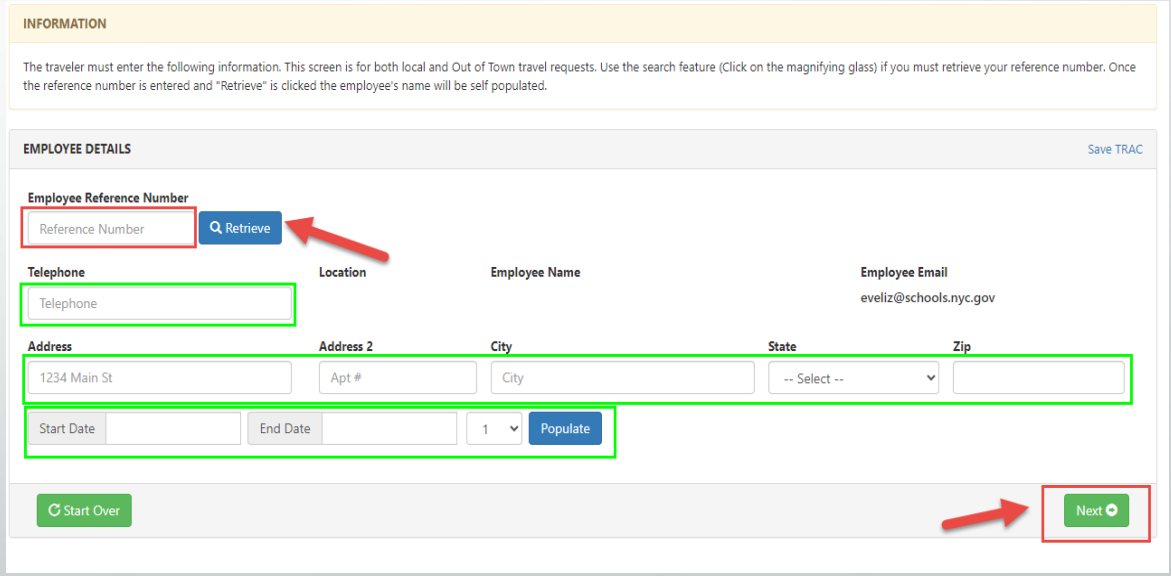
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Local Travel Monthly submission

On the create new page you will select the "Local Travel Reimbursement (Monthly Submission)" and hit the next tab.



On this page you will enter the employee reference number and hit the magnifying glass to get the employee's name and email to populate. You will need enter the information in the highlighted fields below and hit next.



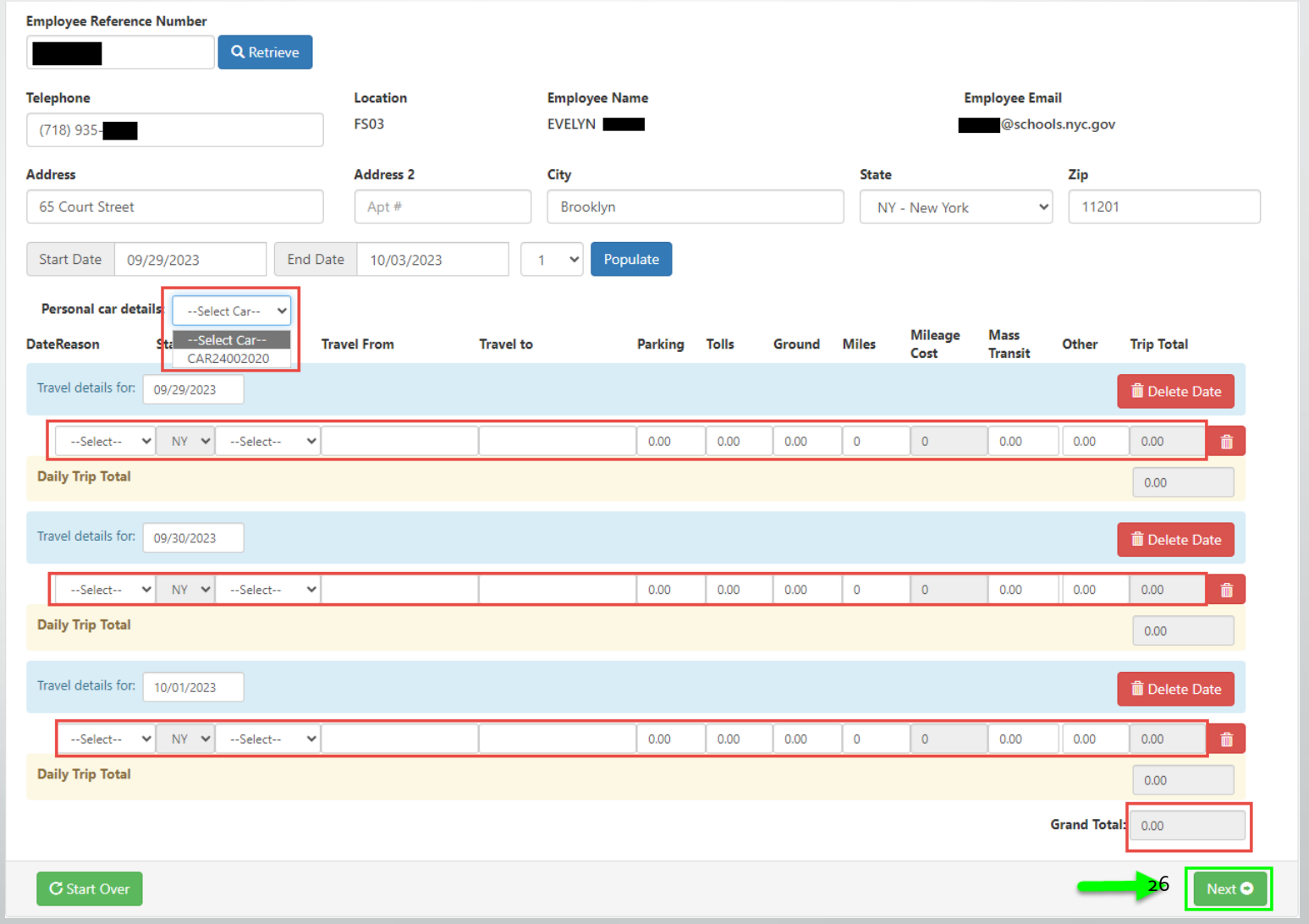
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Local Travel Monthly submission

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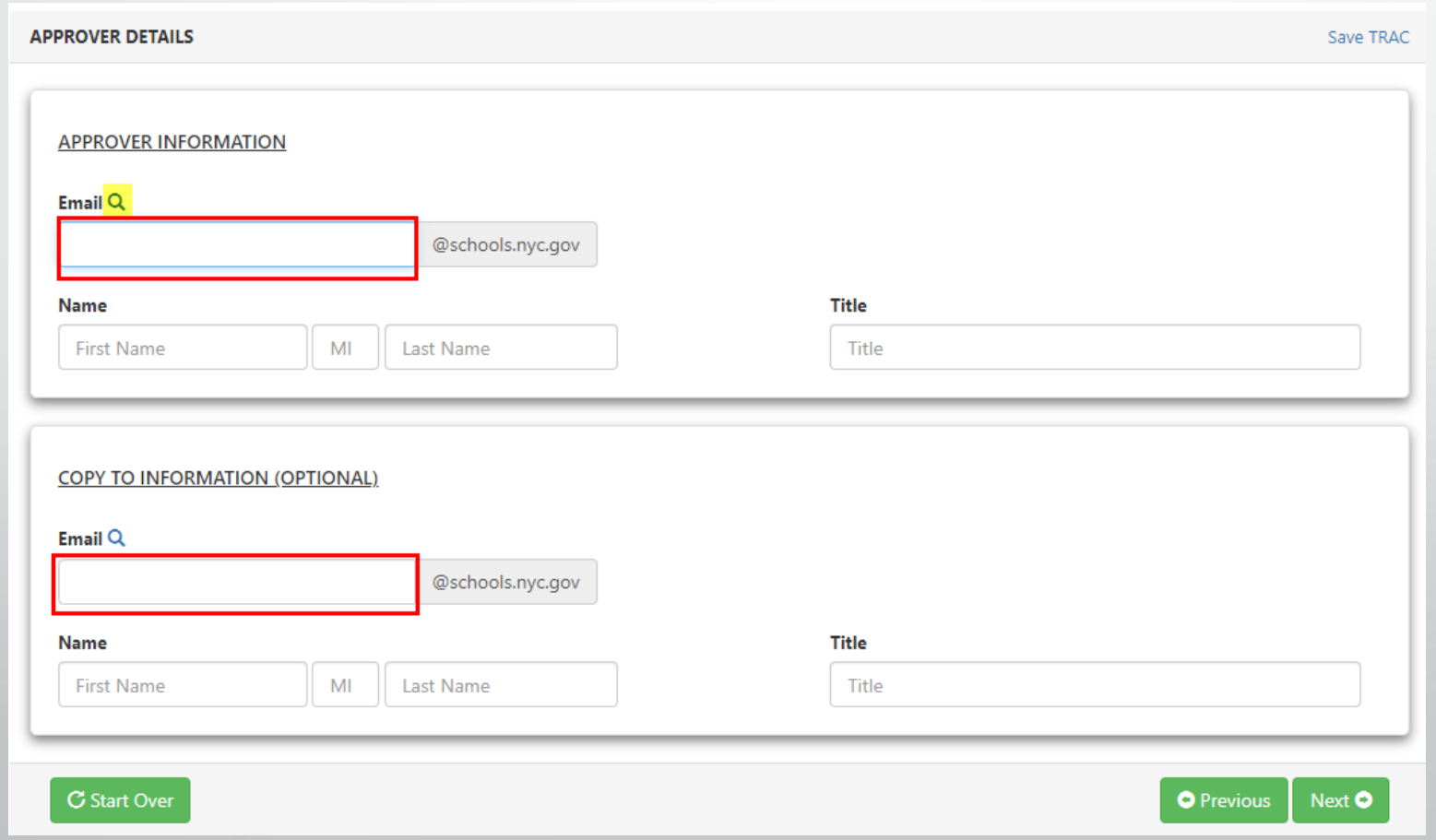
All approved CAR requests will populate in a dropdown for selection.

Enter all other relevant information & travel related expenses incurred, then click next.



Approver Details

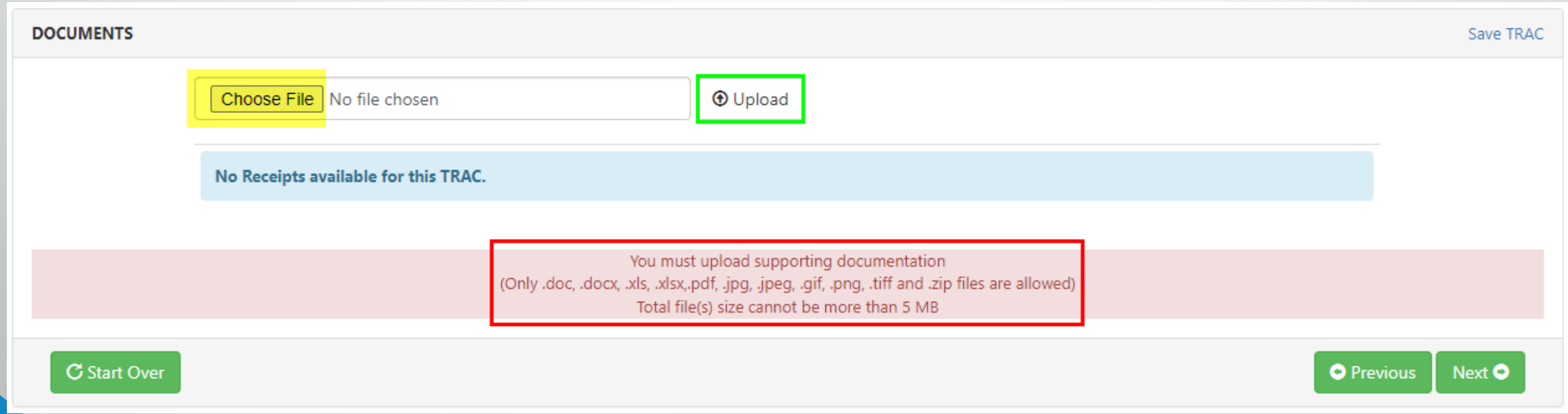
You will enter your approver's email address, without the @schools.nyc.gov (ex: jsmith). You will enter an email address in the 'Copy To' section (person will receive a copy of this request). Once the email is entered, the approver's name and title will auto-populate. If you are unsure of the email address, please click the magnifying glass to search by name. Click Next when finished.



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Documentation Upload

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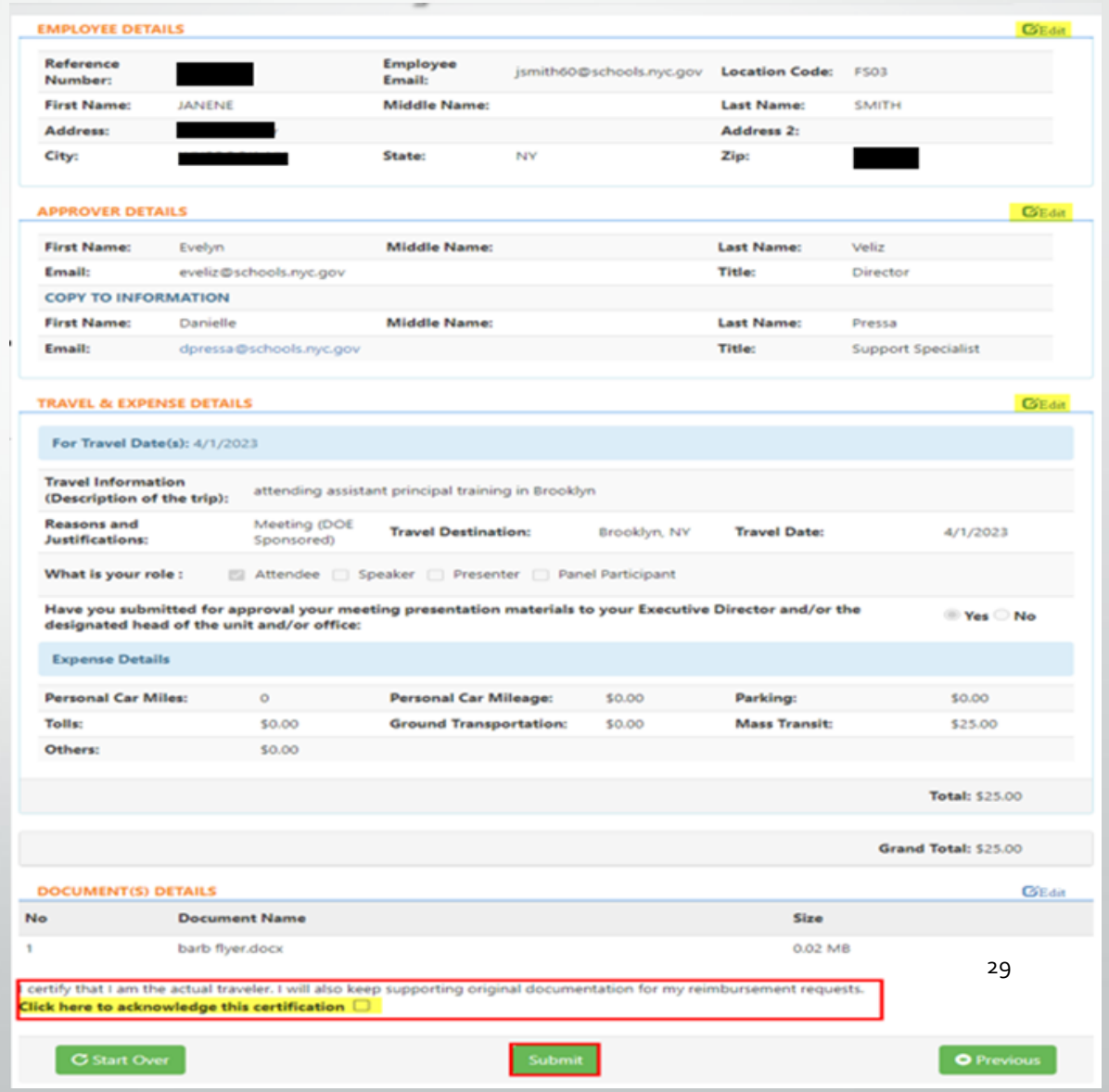


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Confirm and Certify TRAC Details

Review all trip details. If anything is incorrect, click Edit on that section to go back and correct.

If all entered information is correct, select the checkbox certifying you are the traveler and click 'Submit'.



EMPLOYEE DETAILS

Reference Number:	[redacted]	Employee Email:	jsmith60@schools.nyc.gov	Location Code:	FS03
First Name:	JANENE	Middle Name:		Last Name:	SMITH
Address:	[redacted]			Address 2:	
City:	[redacted]	State:	NY	Zip:	[redacted]

APPROVER DETAILS

First Name:	Evelyn	Middle Name:		Last Name:	Veliz
Email:	eveliz@schools.nyc.gov			Title:	Director

COPY TO INFORMATION

First Name:	Danielle	Middle Name:		Last Name:	Pressa
Email:	dpressa@schools.nyc.gov			Title:	Support Specialist

TRAVEL & EXPENSE DETAILS

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Travel Information (Description of the trip):	attending assistant principal training in Brooklyn				
Reasons and Justifications:	Meeting (DOE Sponsored)	Travel Destination:	Brooklyn, NY	Travel Date:	4/1/2023

What is your role : ☑ Attendee ☐ Speaker ☐ Presenter ☐ Panel Participant

Have you submitted for approval your meeting presentation materials to your Executive Director and/or the designated head of the unit and/or office: ◉ Yes ○ No

Expense Details

Personal Car Miles:	0	Personal Car Mileage:	$0.00	Parking:	$0.00
Tolls:	$0.00	Ground Transportation:	$0.00	Mass Transit:	$25.00
Others:	$0.00				

Total: $25.00

Grand Total: $25.00

DOCUMENT(S) DETAILS

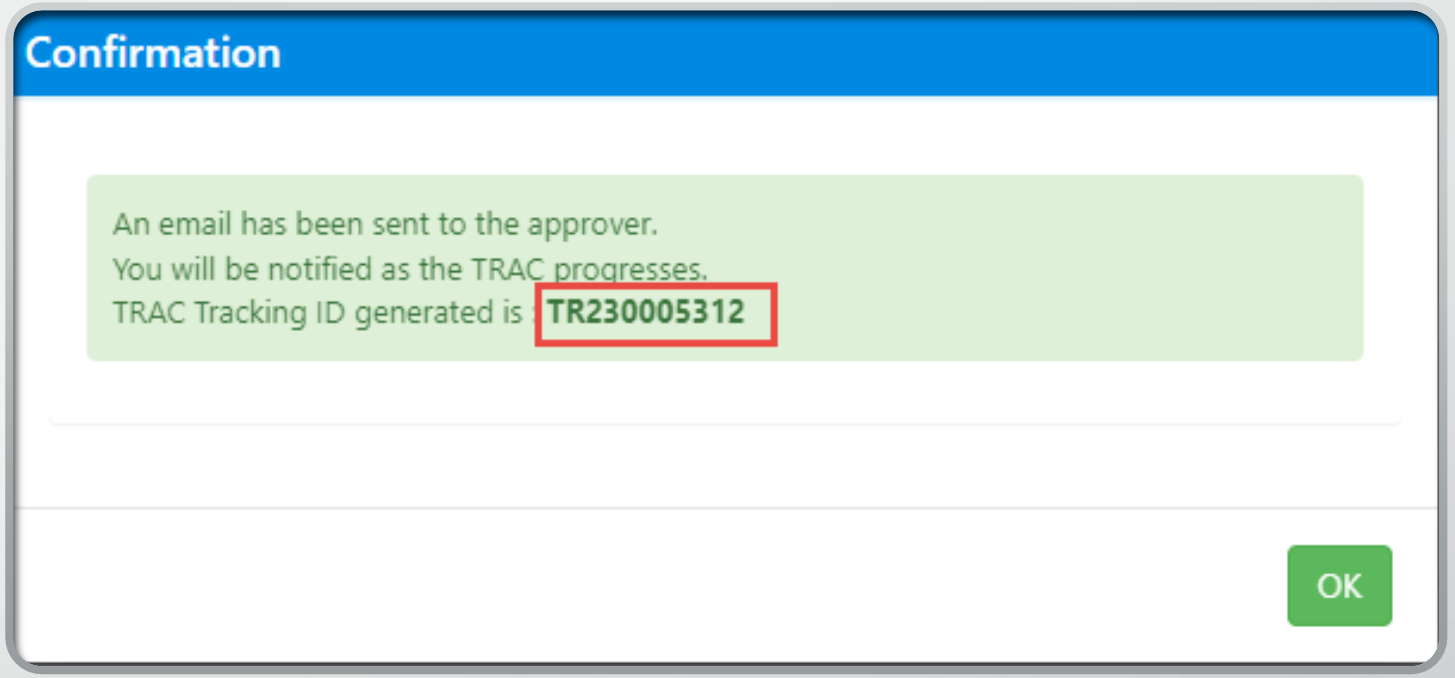
No	Document Name	Size
1	barb flyer.docx	0.02 MB

I certify that I am the actual traveler. I will also keep supporting original documentation for my reimbursement requests.
Click here to acknowledge this certification ☐

Start Over | Submit | Previous

TRAC Progress

Once you submit your TRAC a 'TR' document number will be generated, and an approval email will be sent to your approver.

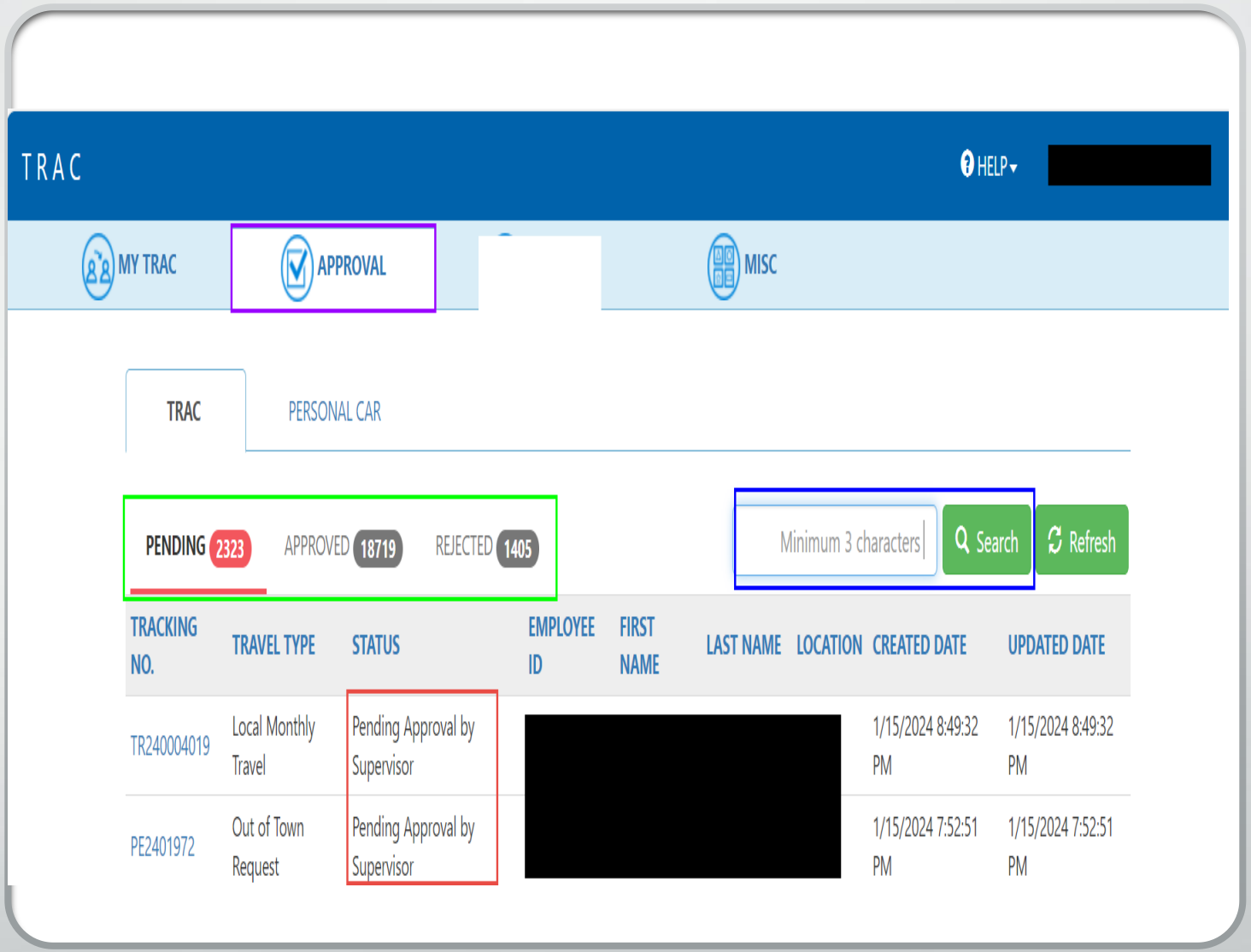


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TRAC APPROVAL STATUS

TRAC Approval Status

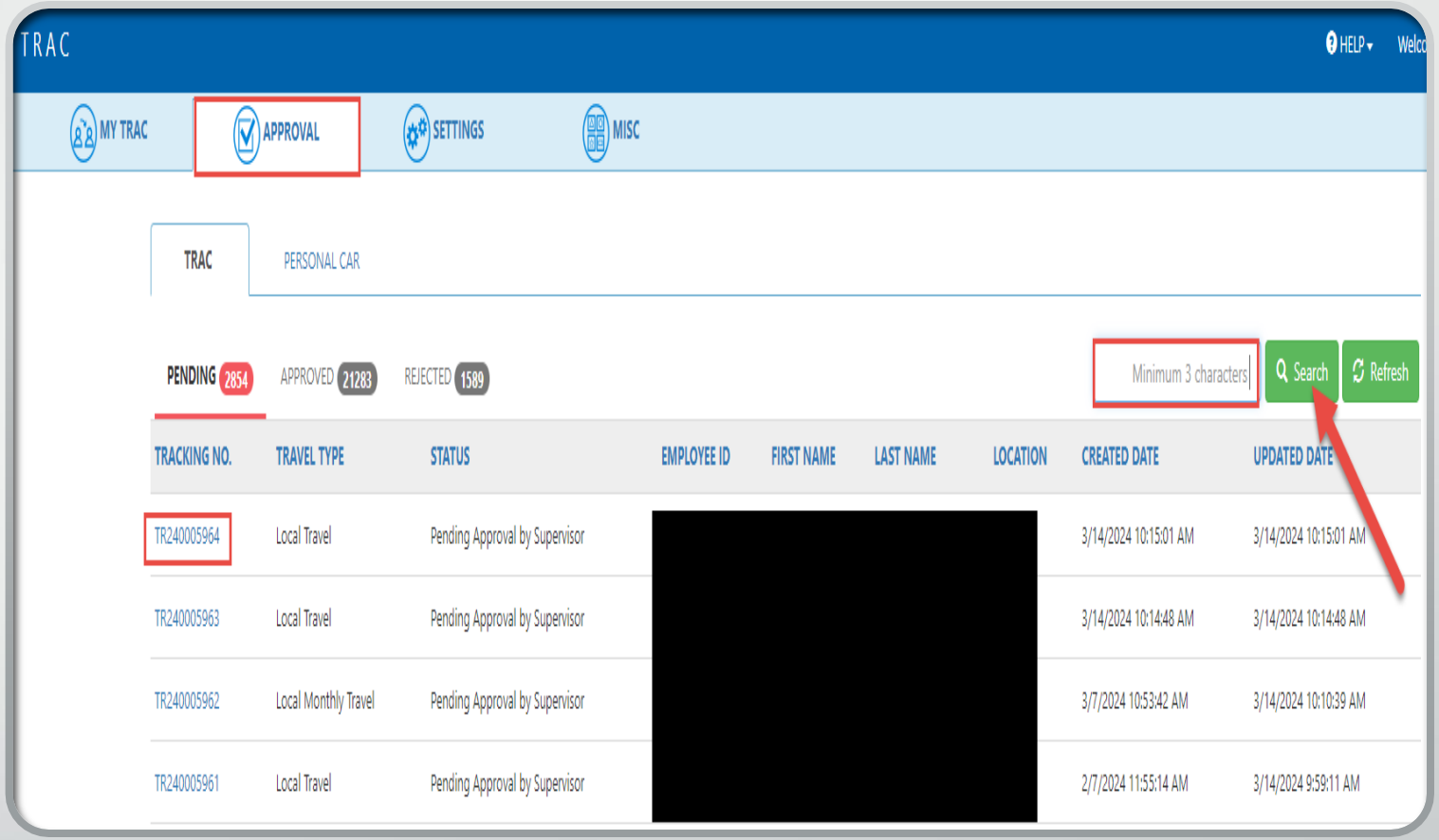
The TRAC approver will need to go into the "Approval Tab" to approve or reject the TRAC. In this tab you can search by TR# it will show what status the document is in.



TRAC Approval Status- Search Option

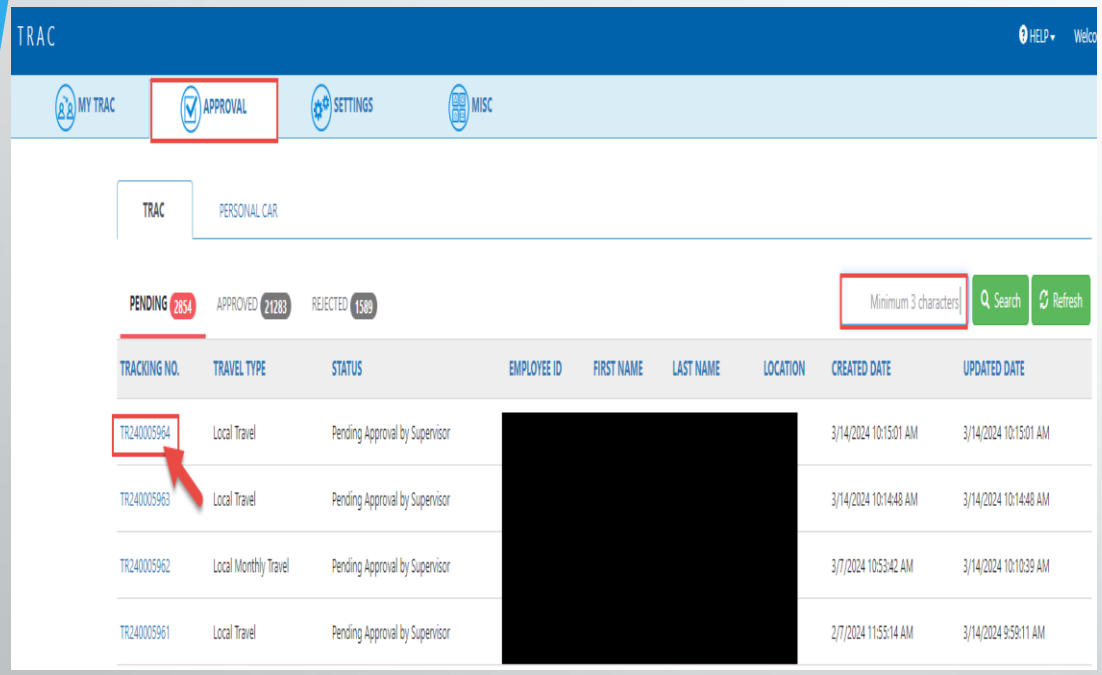
Flow chart shows the history of a TRAC.

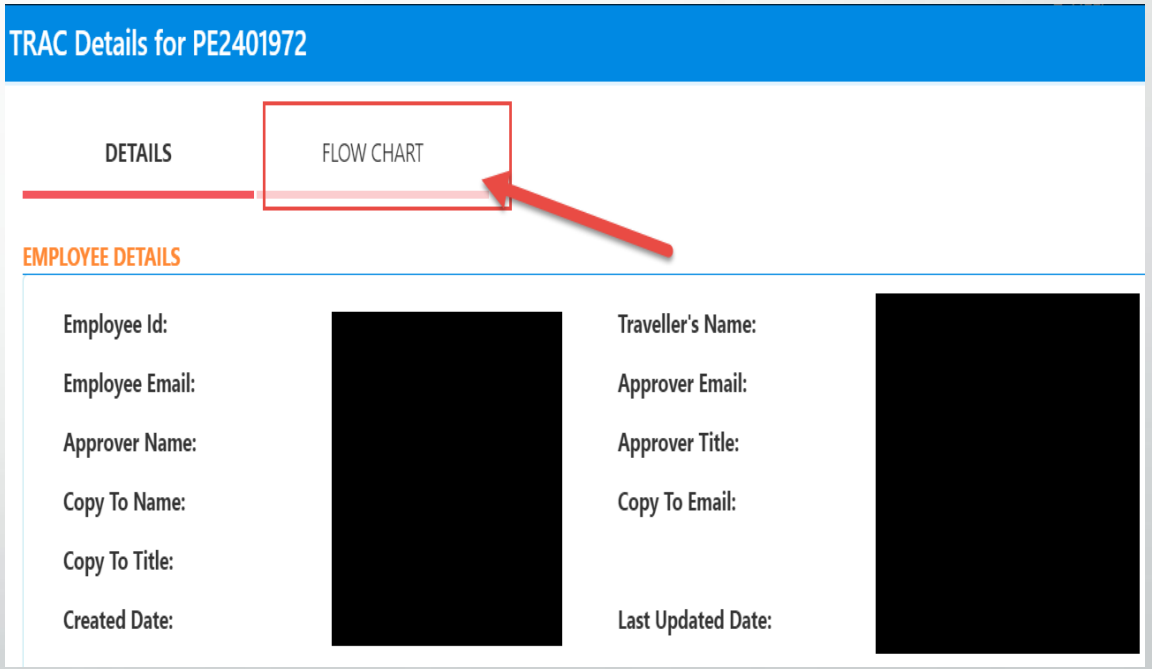
To view the flow chart for a "TRAC" you must go into the approval tab and enter the TR document number and hit search. Once the TR document number populates you will "click" on the document number.



TRAC Approval Status- Flow Chart

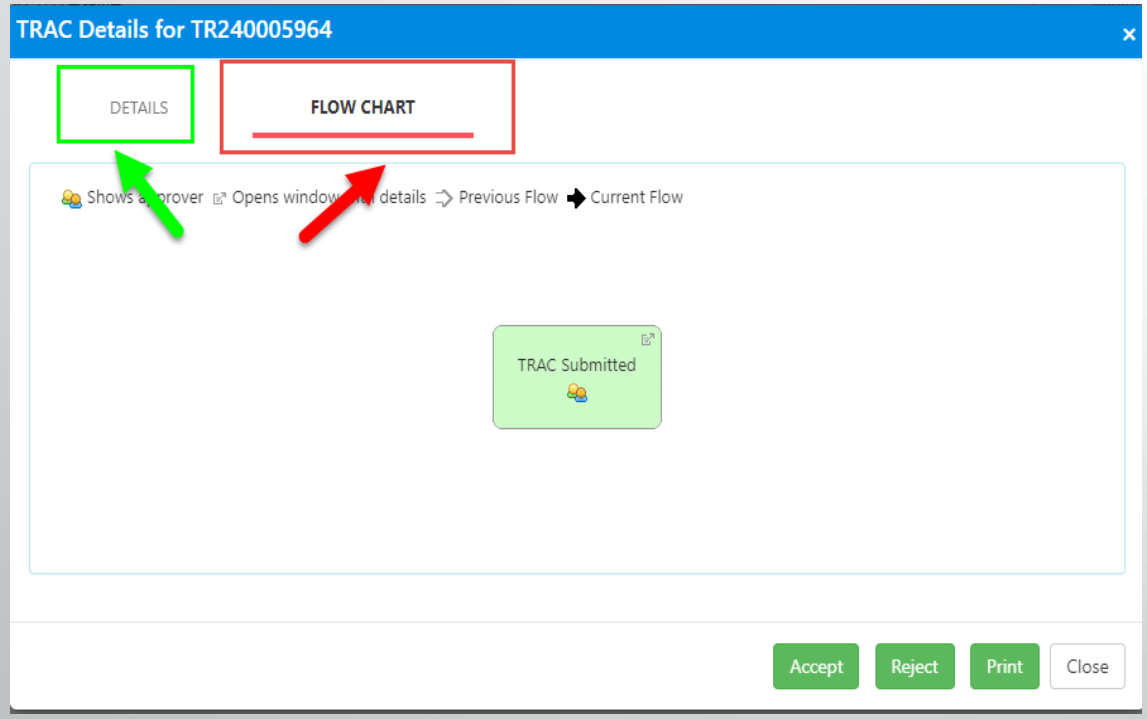
You can "click" on the TR document number which will populate the details of the TR Document. You can then select flow chart.

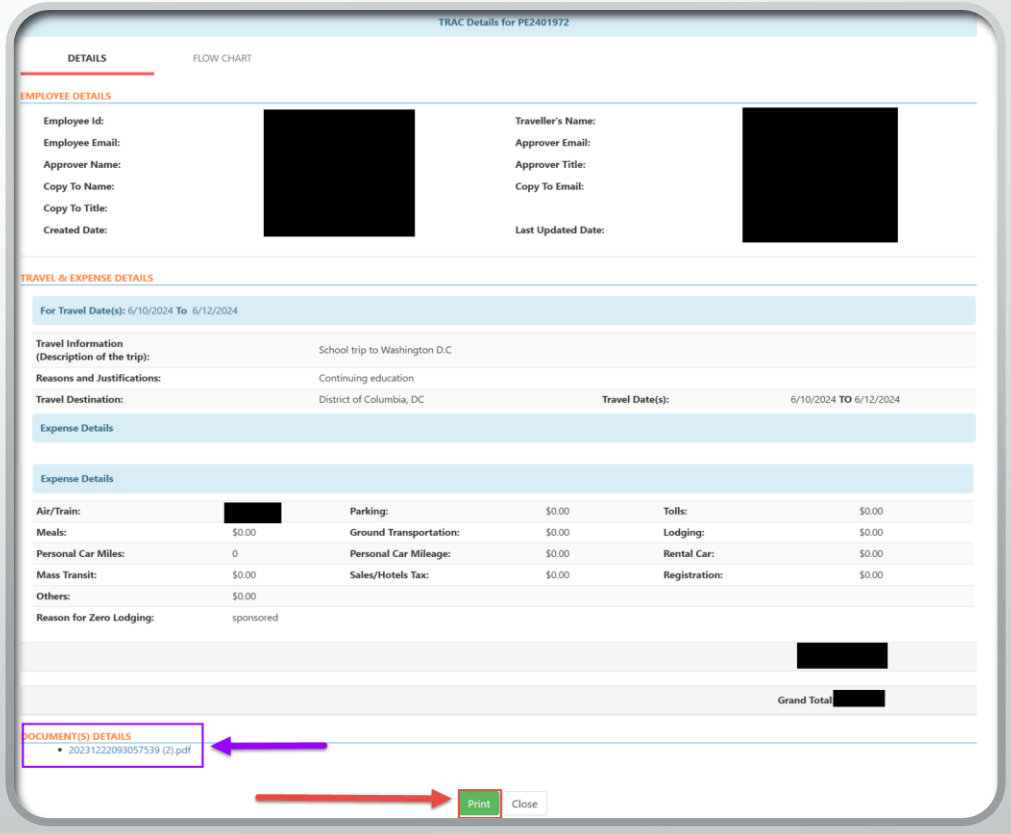




TRAC Approval Status- Flow Chart

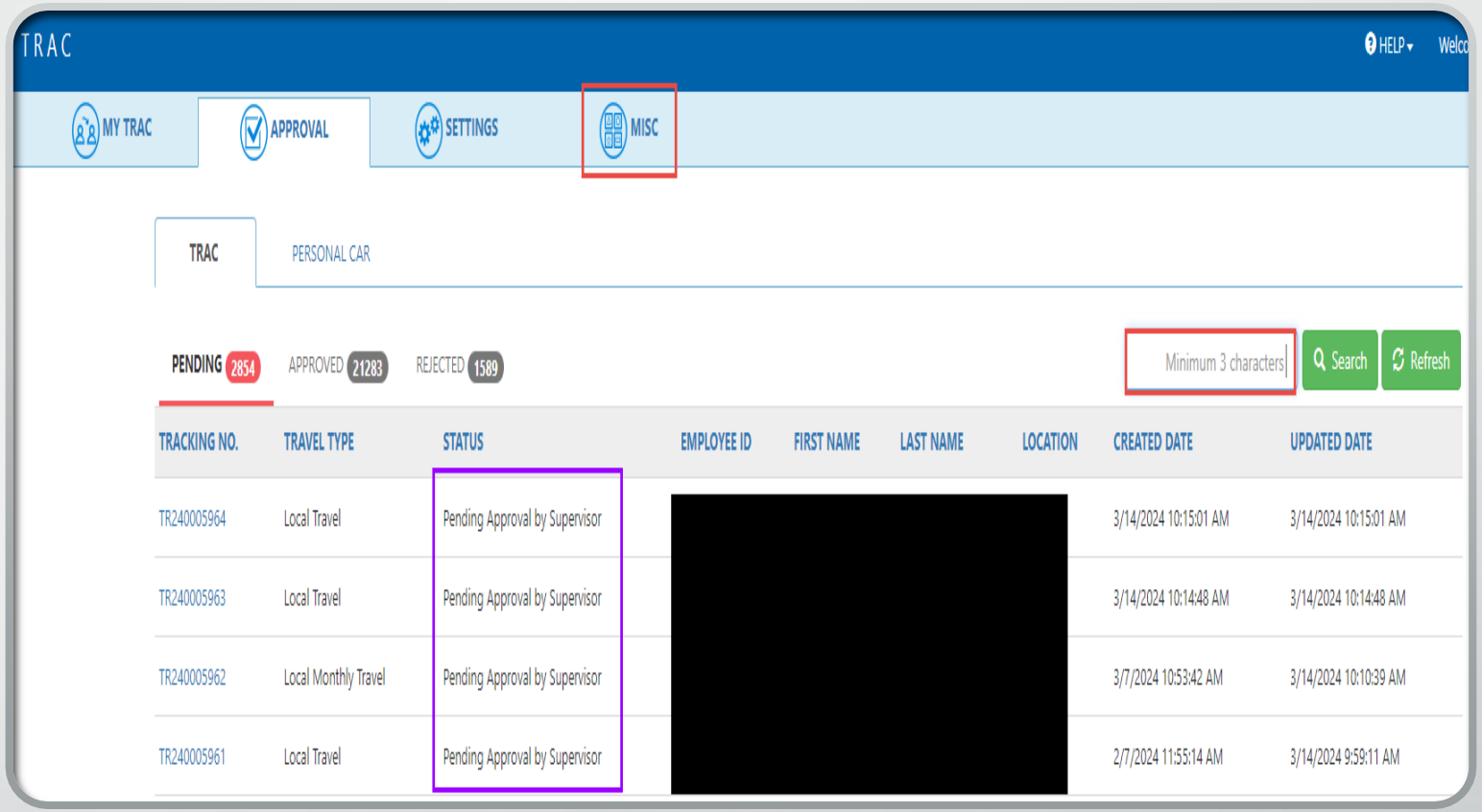
You can now "click" on flow chart to see the history of the TRAC. If you need to view the attached supporting documents or details of the TRAC, you will select details.





Miscellaneous Tab

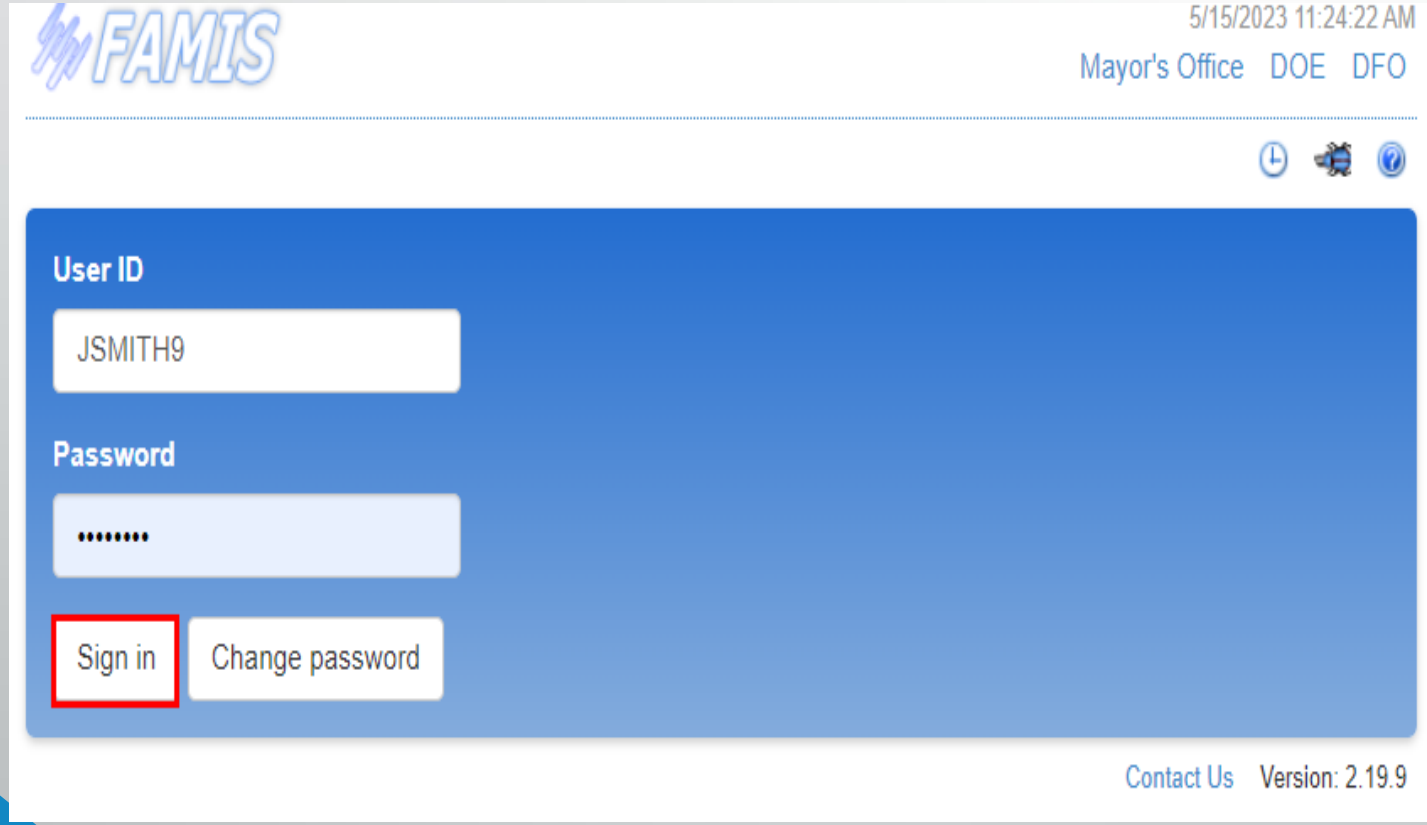
- The MISC tab allows users to access any TRAC documents status (pending approval, approved, rejected) for any TRAC document.

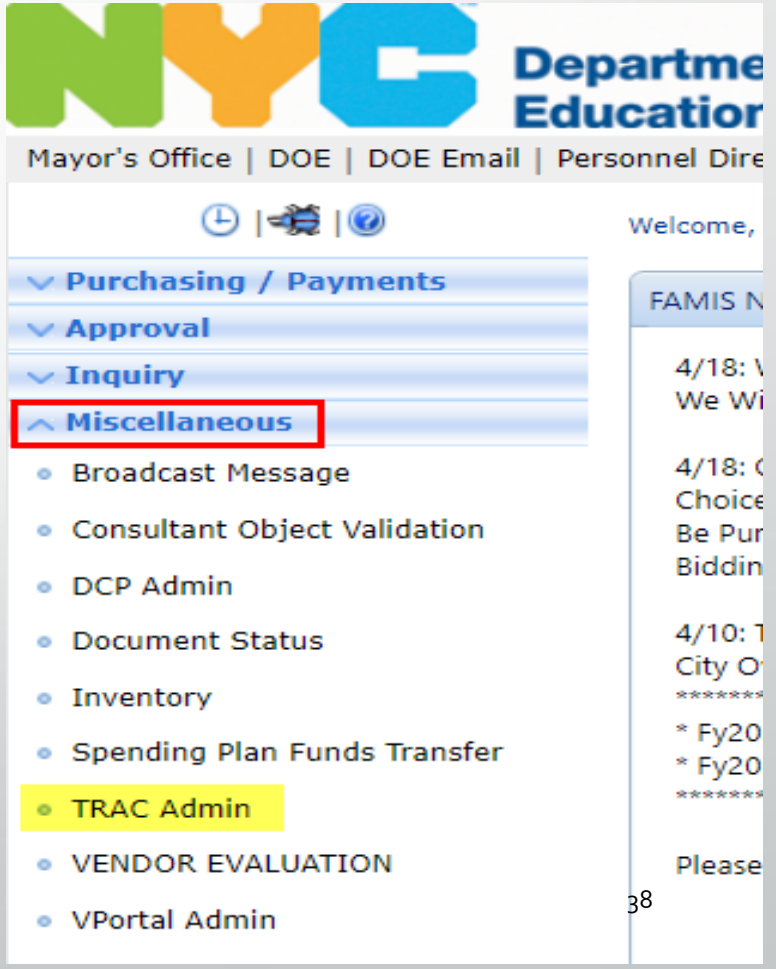


Funding a Local Travel Reimbursement in FAMIS

Funding a Local Travel Reimbursement in FAMIS

The FAMIS user will log into the FAMIS portal. You will go under the Miscellaneous tab and "click" on TRAC Admin.



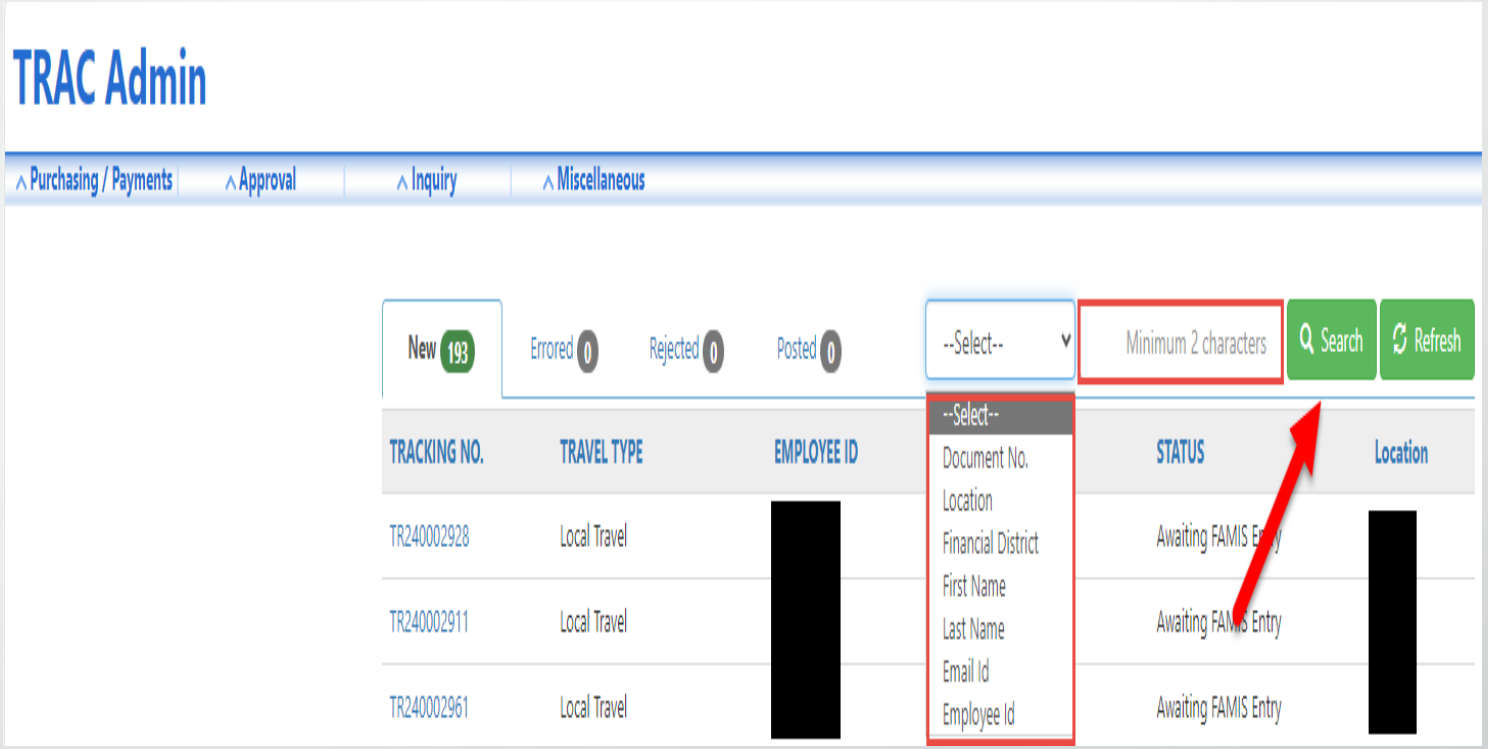


TRAC ADMIN – Search Options

TRAC Admin Search Options

You can search TRAC documents by:

- **Document #**
- **Location**
- **Financial District**
- **First Name**
- **Last Name**
- **First Name**
- **Email ID**
- **Employee ID**

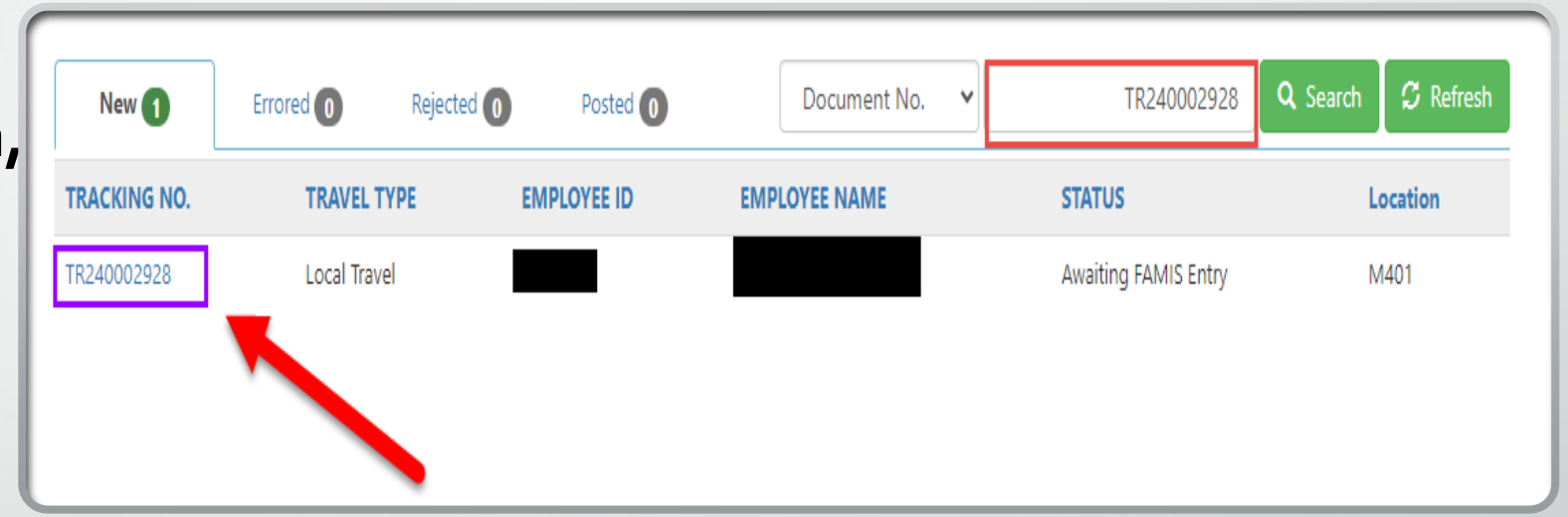


Once you have populated the search option and entered the information you will "click "on search

TRAC ADMIN (search cont.)

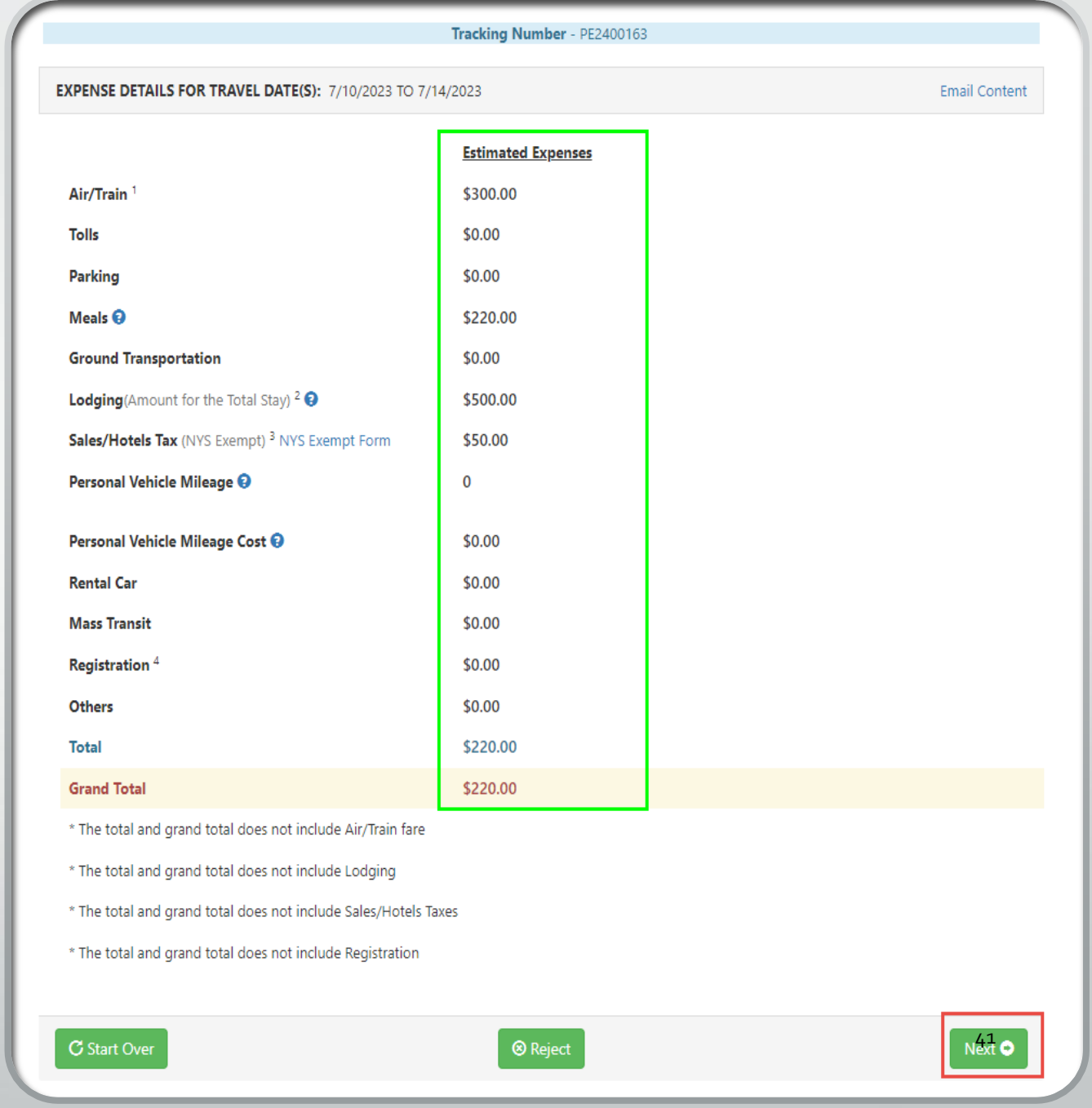
Once you select the appropriate search option, the TRAC document(s) # will appear.

Click on the TR number to view the TRAC details.



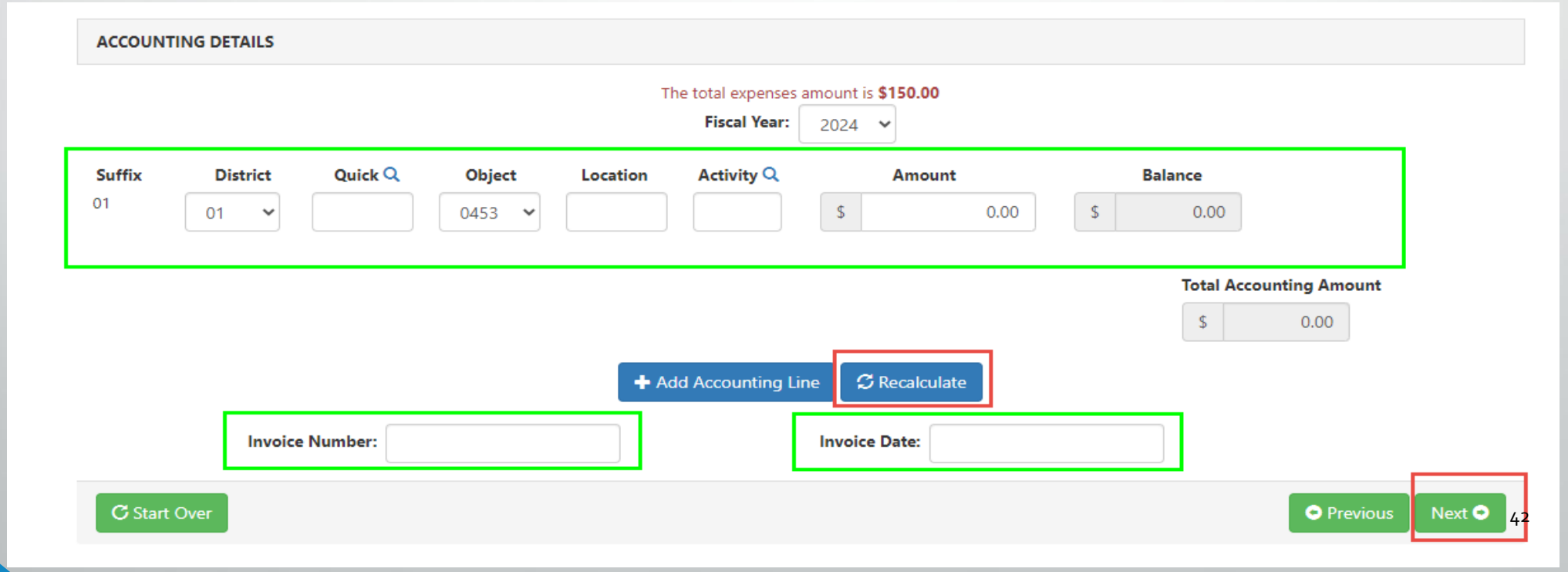
TRAC Local Expense Screen

You will need to review the expenditures to ensure everything is correct. If the amounts are incorrect, you can also reject it and send it back to the traveler to edit/correct the TRAC (projected expense).



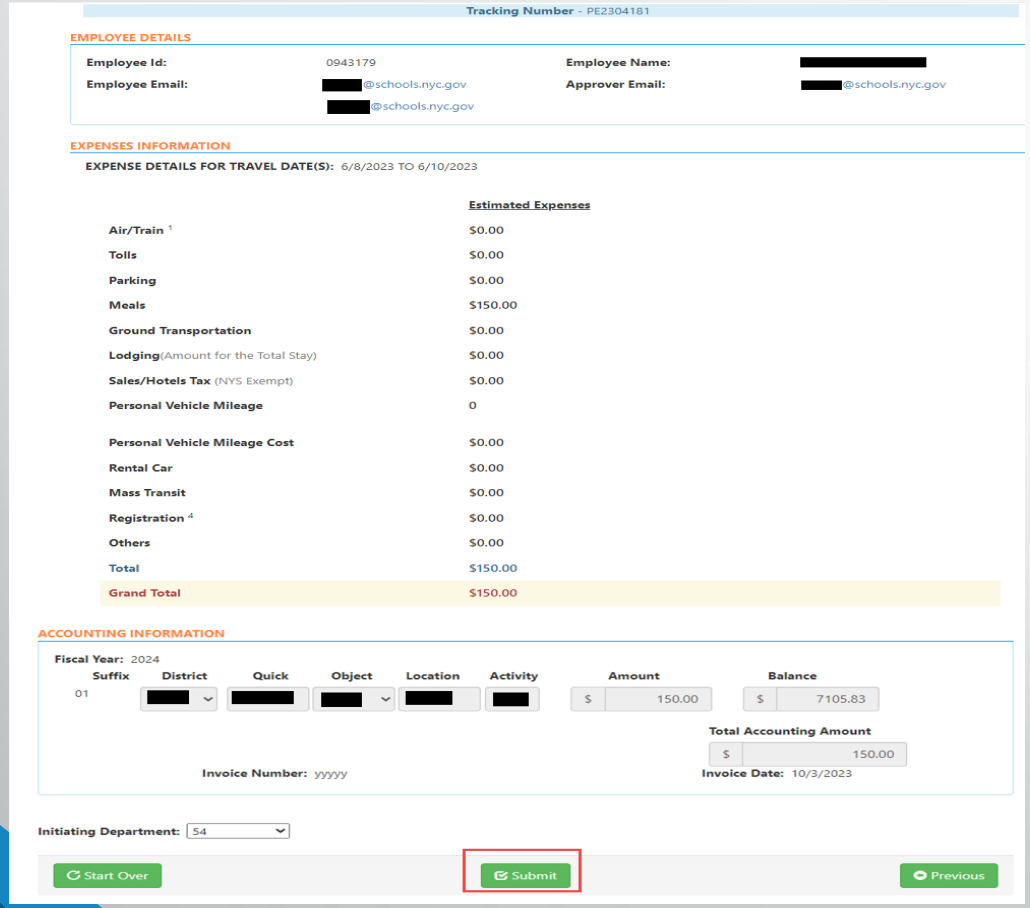
TRAC Local Account Details

You will now enter the accounting code details that will be used to fund the reimbursement. It should match the total expense amount from the previous screen. All highlighted fields must be filled out , you will then hit the recalculate button & click 'Next' to continue to the next screen.



TRAC Local Account Details

You must review everything for accuracy and then you will click the "submit button".



Tracking Number - PE2304181

EMPLOYEE DETAILS

Employee Id:	0943179	Employee Name:	[redacted]
Employee Email:	[redacted]@schools.nyc.gov	Approver Email:	[redacted]@schools.nyc.gov
	[redacted]@schools.nyc.gov		

EXPENSES INFORMATION

EXPENSE DETAILS FOR TRAVEL DATE(S): 6/8/2023 TO 6/10/2023

	Estimated Expenses
Air/Train [1]	$0.00
Tolls	$0.00
Parking	$0.00
Meals	$150.00
Ground Transportation	$0.00
Lodging(Amount for the Total Stay)	$0.00
Sales/Hotels Tax (NYS Exempt)	$0.00
Personal Vehicle Mileage	0
Personal Vehicle Mileage Cost	$0.00
Rental Car	$0.00
Mass Transit	$0.00
Registration [4]	$0.00
Others	$0.00
Total	$150.00
Grand Total	$150.00

ACCOUNTING INFORMATION

Fiscal Year: 2024

Suffix	District	Quick	Object	Location	Activity	Amount	Balance
01	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	$ 150.00	$ 7105.83

Total Accounting Amount: $ 150.00

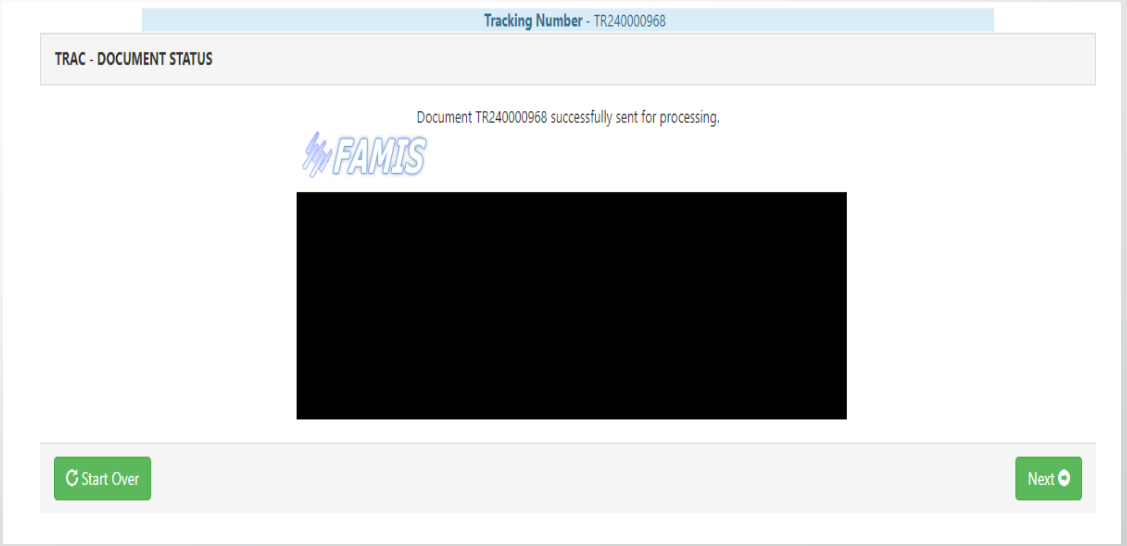
Invoice Number: yyyyy

Invoice Date: 10/3/2023

Initiating Department: 54

Start Over | Submit | Previous

You will then see this screen stating that the TRAC was successfully submitted for processing.



Tracking Number - TR240000968

TRAC - DOCUMENT STATUS

Document TR240000968 successfully sent for processing.

FAMIS

[redacted]

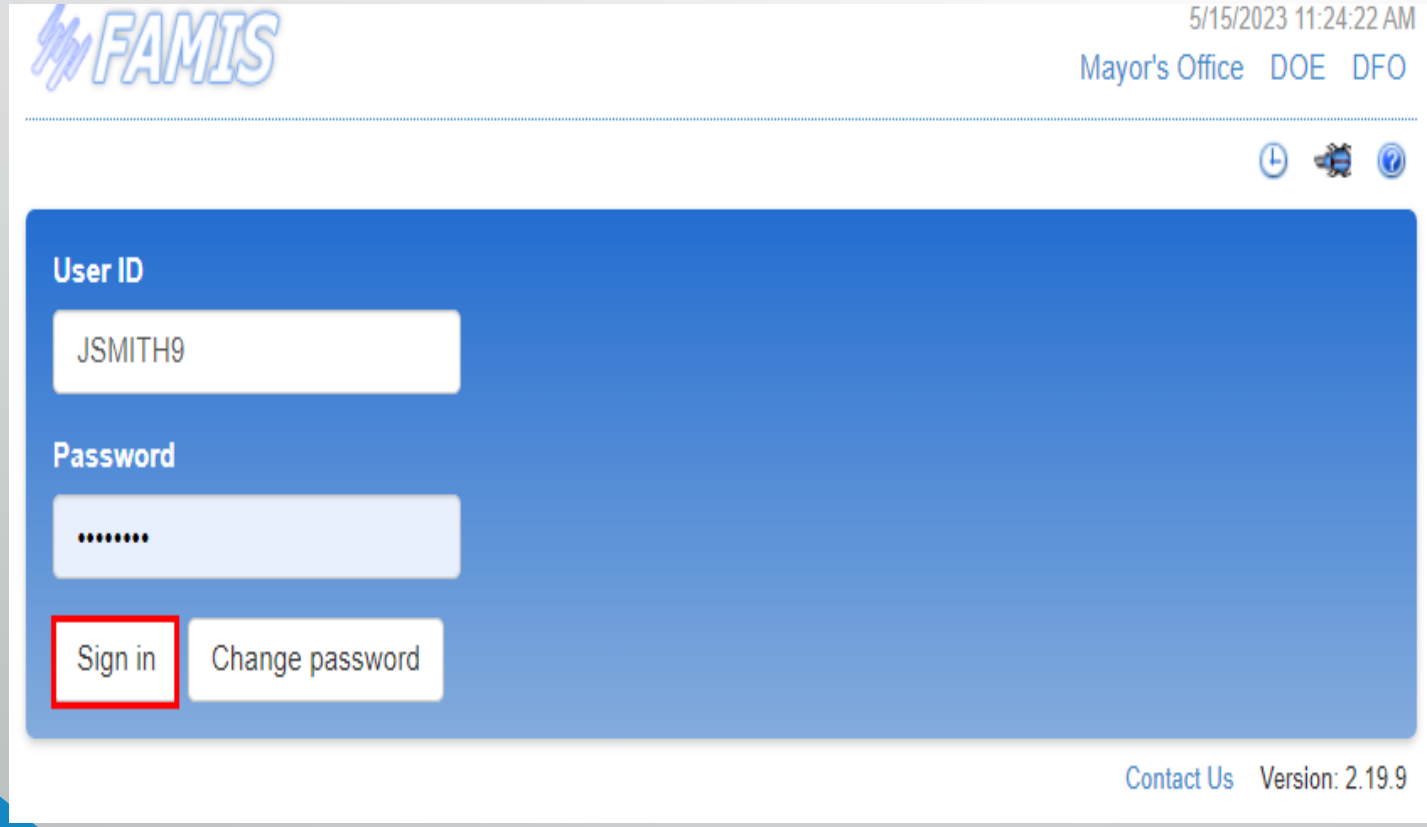
Start Over | Next

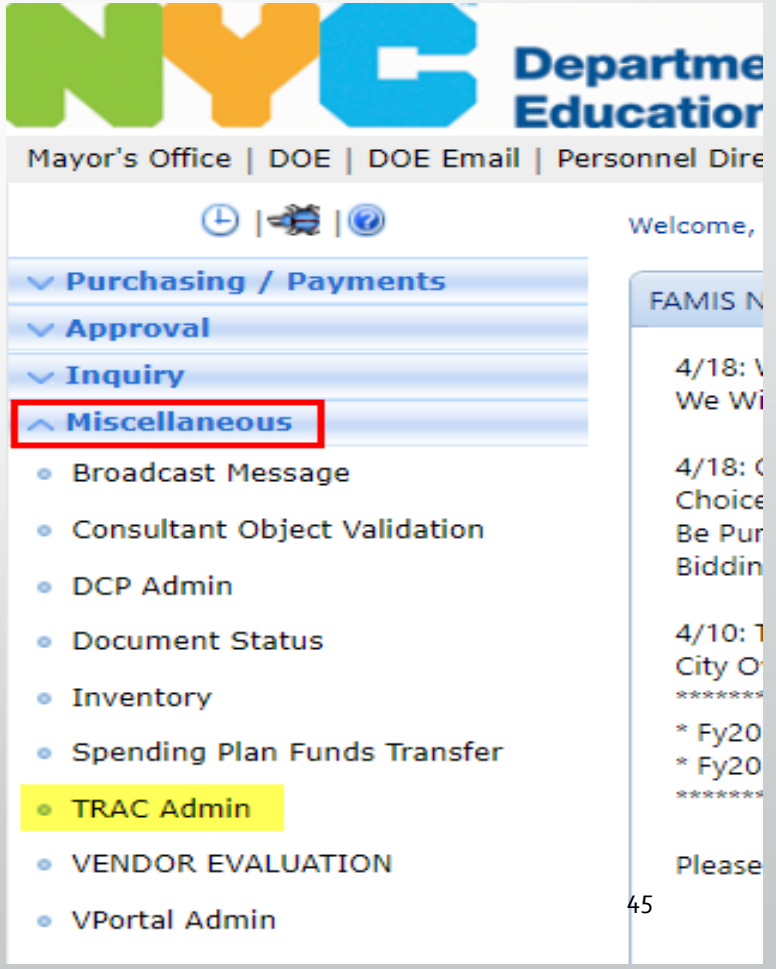
NYC Department of Education

Funding a Local Monthly Travel Reimbursement in FAMIS

Funding a Local Monthly Travel Reimbursement in FAMIS

The FAMIS user will log into the FAMIS portal. You will go under the Miscellaneous tab and "click" on TRAC Admin.



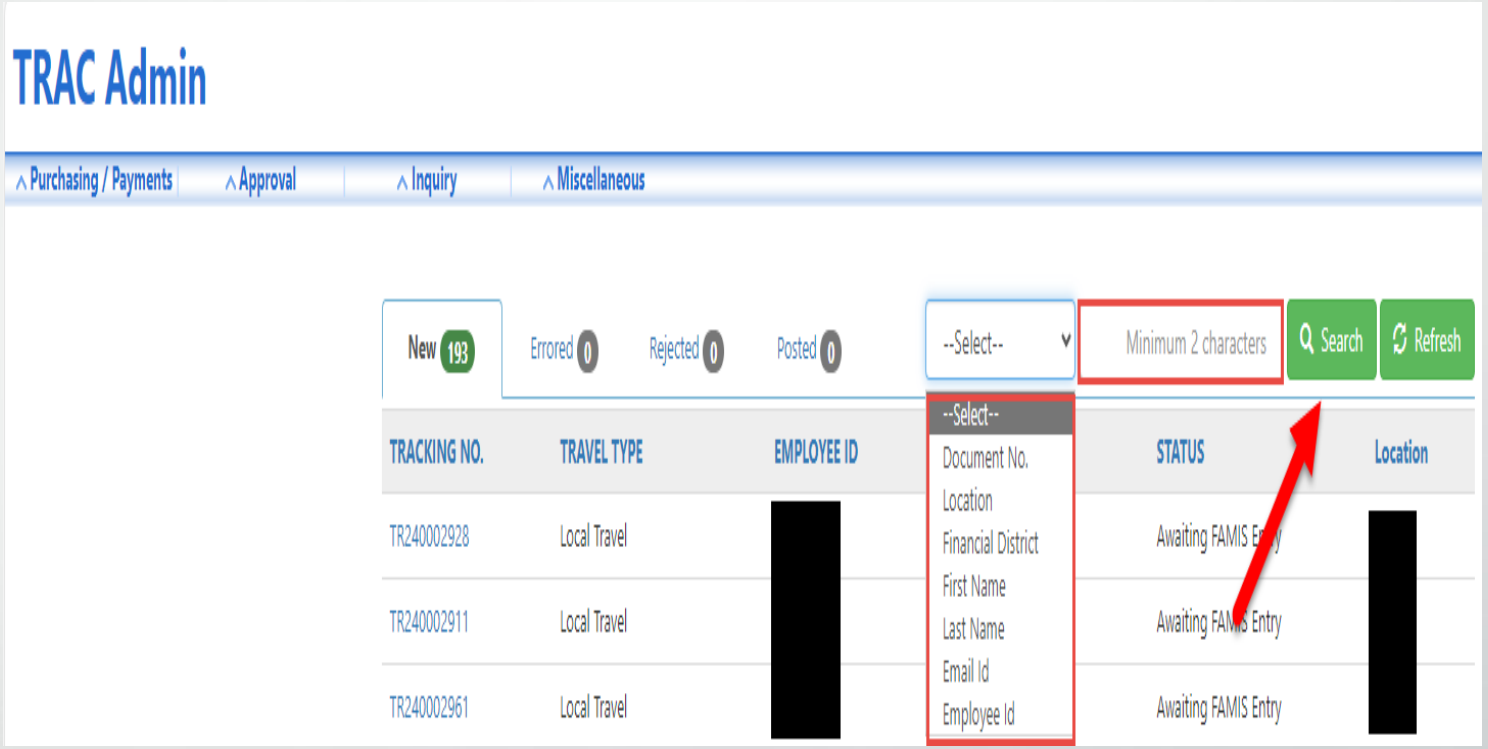


TRAC ADMIN – Search Options

TRAC Admin Search Options

You can search TRAC documents by:

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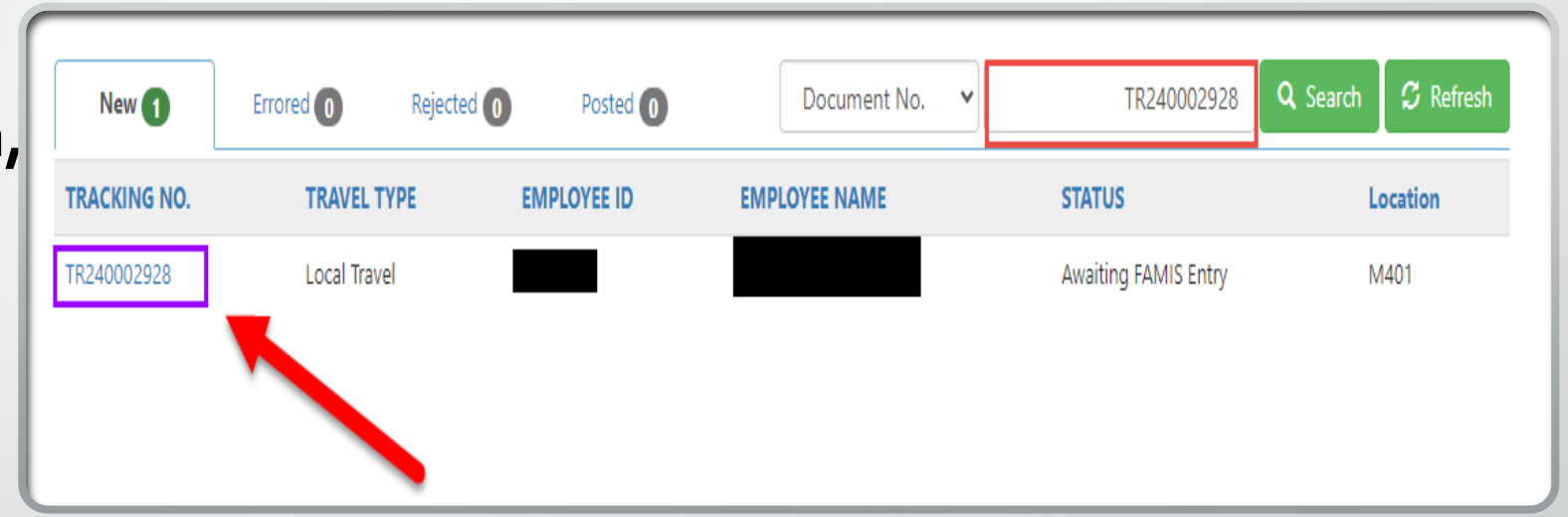


Once you have populated the search option and entered the information you will "click "on search

TRAC ADMIN (search cont.)

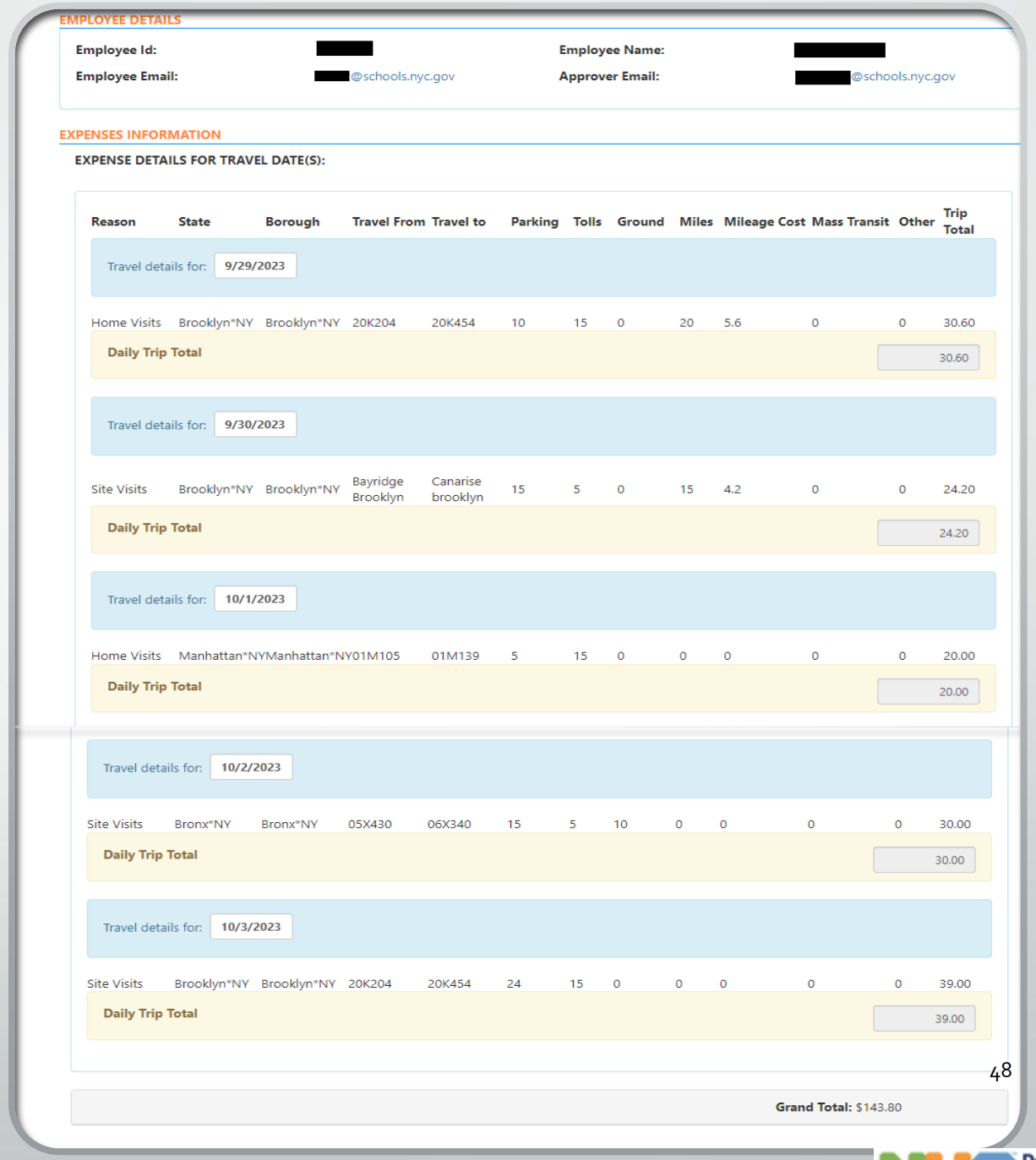
Once you select the appropriate search option, the TRAC document(s) # will appear.

Click on the TR number to view the TRAC details.



TRAC Monthly Expense Screen

You will need to review the expenditures to ensure everything is correct. If the amounts are incorrect, you can also reject it and send it back to the traveler to edit/correct the TRAC (projected expense).



EMPLOYEE DETAILS

Employee Id: [redacted] Employee Name: [redacted]

Employee Email: [redacted]@schools.nyc.gov Approver Email: [redacted]@schools.nyc.gov

EXPENSES INFORMATION

EXPENSE DETAILS FOR TRAVEL DATE(S):

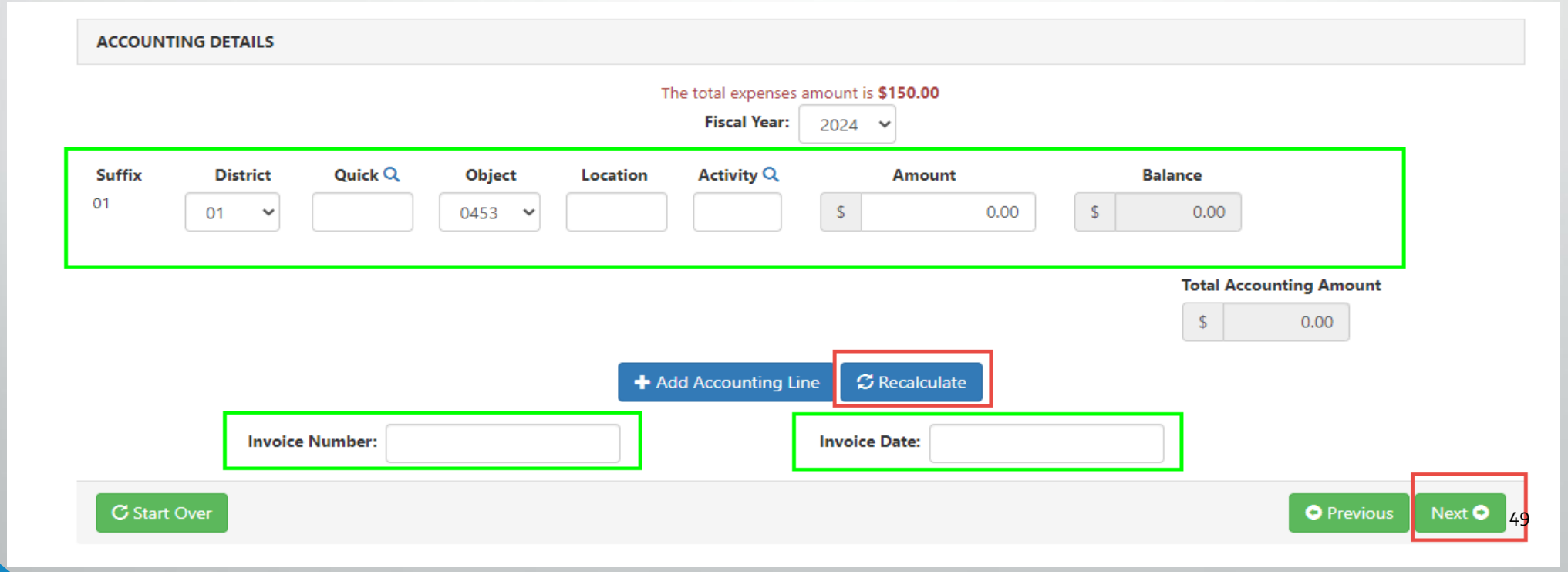
Reason	State	Borough	Travel From	Travel to	Parking	Tolls	Ground	Miles	Mileage Cost	Mass Transit	Other	Trip Total
Travel details for: 9/29/2023												
Home Visits	Brooklyn*NY	Brooklyn*NY	20K204	20K454	10	15	0	20	5.6	0	0	30.60
Daily Trip Total												30.60
Travel details for: 9/30/2023												
Site Visits	Brooklyn*NY	Brooklyn*NY	Bayridge Brooklyn	Canarise brooklyn	15	5	0	15	4.2	0	0	24.20
Daily Trip Total												24.20
Travel details for: 10/1/2023												
Home Visits	Manhattan*NY	Manhattan*NY	01M105	01M139	5	15	0	0	0	0	0	20.00
Daily Trip Total												20.00
Travel details for: 10/2/2023												
Site Visits	Bronx*NY	Bronx*NY	05X430	06X340	15	5	10	0	0	0	0	30.00
Daily Trip Total												30.00
Travel details for: 10/3/2023												
Site Visits	Brooklyn*NY	Brooklyn*NY	20K204	20K454	24	15	0	0	0	0	0	39.00
Daily Trip Total												39.00

Grand Total: $143.80

NYC Department of Education

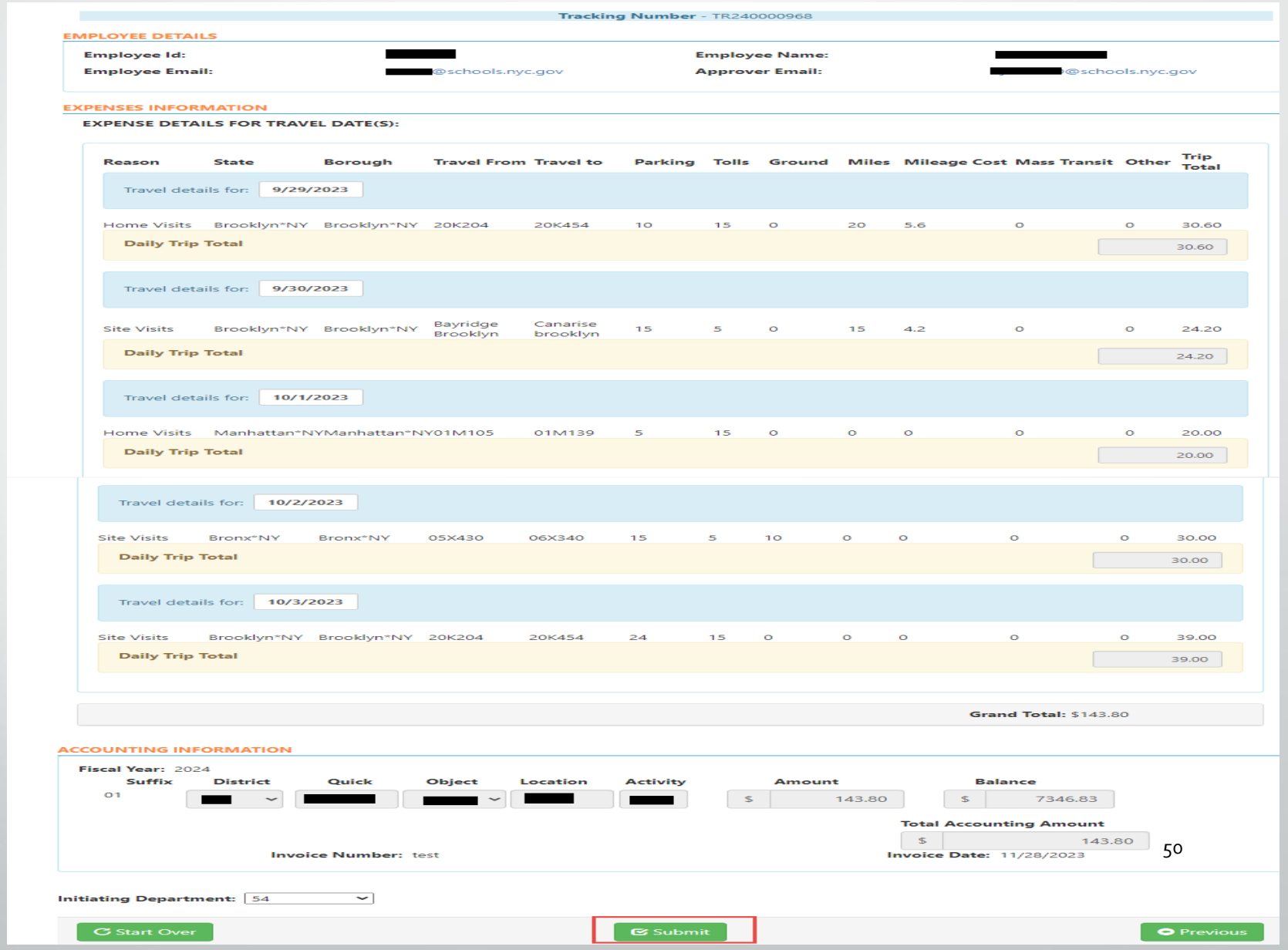
TRAC Local Account Details

You will now enter the accounting code details that will be used to fund the reimbursement. It should match the total expense amount from the previous screen. All highlighted fields must be filled out , you will then hit the recalculate button & click 'Next' to continue to the next screen.



TRAC Monthly Account Details

Verify that all the information is correct then click 'submit'.



Tracking Number - TR240000968

EMPLOYEE DETAILS

Employee Id: [redacted]
Employee Email: [redacted]@schools.nyc.gov
Employee Name: [redacted]
Approver Email: [redacted]@schools.nyc.gov

EXPENSES INFORMATION

EXPENSE DETAILS FOR TRAVEL DATE(S):

Reason	State	Borough	Travel From	Travel to	Parking	Tolls	Ground	Miles	Mileage Cost	Mass Transit	Other	Trip Total
Travel details for: 9/29/2023												
Home Visits	Brooklyn*NY	Brooklyn*NY	20K204	20K454	10	15	0	20	5.6	0	0	30.60
Daily Trip Total												30.60
Travel details for: 9/30/2023												
Site Visits	Brooklyn*NY	Brooklyn*NY	Bayridge Brooklyn	Canarise brooklyn	15	5	0	15	4.2	0	0	24.20
Daily Trip Total												24.20
Travel details for: 10/1/2023												
Home Visits	Manhattan*NY	Manhattan*NY	01M105	01M139	5	15	0	0	0	0	0	20.00
Daily Trip Total												20.00
Travel details for: 10/2/2023												
Site Visits	Bronx*NY	Bronx*NY	05X430	06X340	15	5	10	0	0	0	0	30.00
Daily Trip Total												30.00
Travel details for: 10/3/2023												
Site Visits	Brooklyn*NY	Brooklyn*NY	20K204	20K454	24	15	0	0	0	0	0	39.00
Daily Trip Total												39.00

Grand Total: $143.80

ACCOUNTING INFORMATION

Fiscal Year: 2024

Suffix	District	Quick	Object	Location	Activity	Amount	Balance
01	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	$ 143.80	$ 7346.83

Total Accounting Amount: $ 143.80

Invoice Number: test

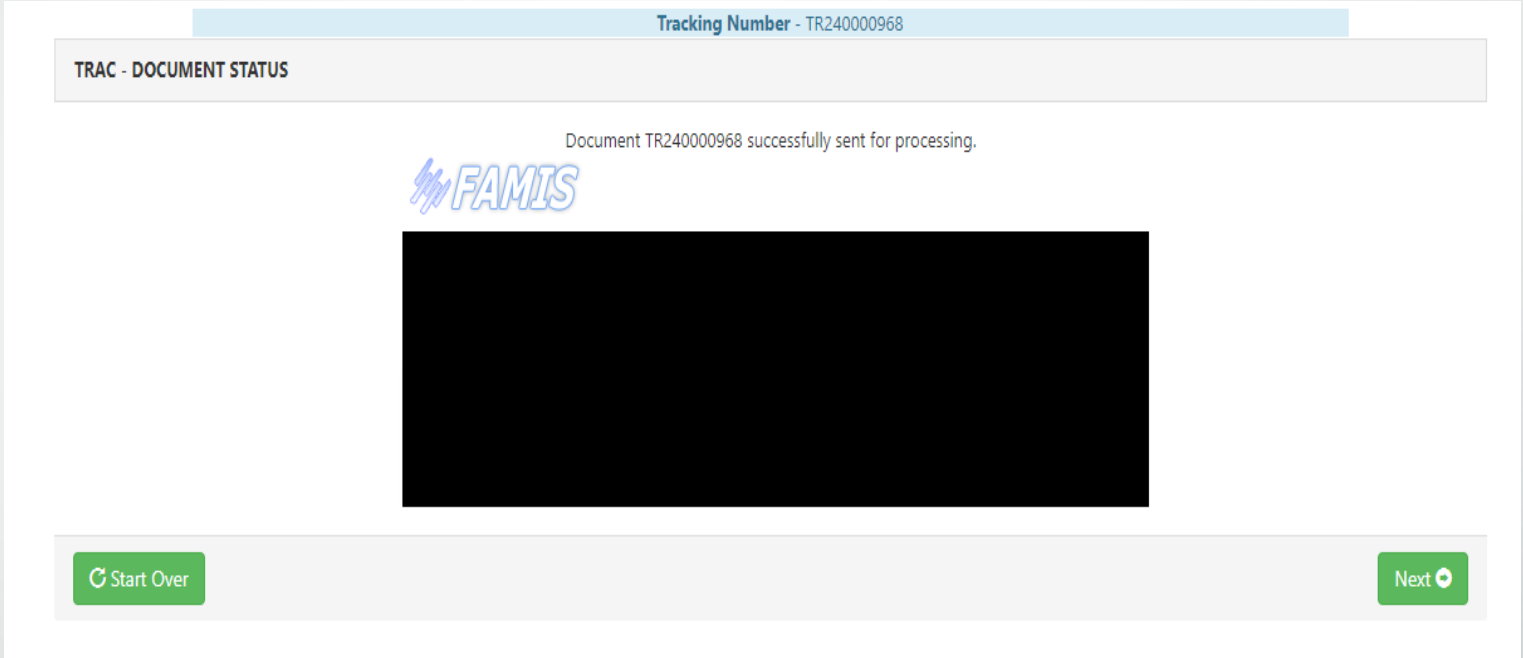
Invoice Date: 11/28/2023

Initiating Department: 54

Start Over | Submit | Previous

TRAC Monthly Admin Account Details

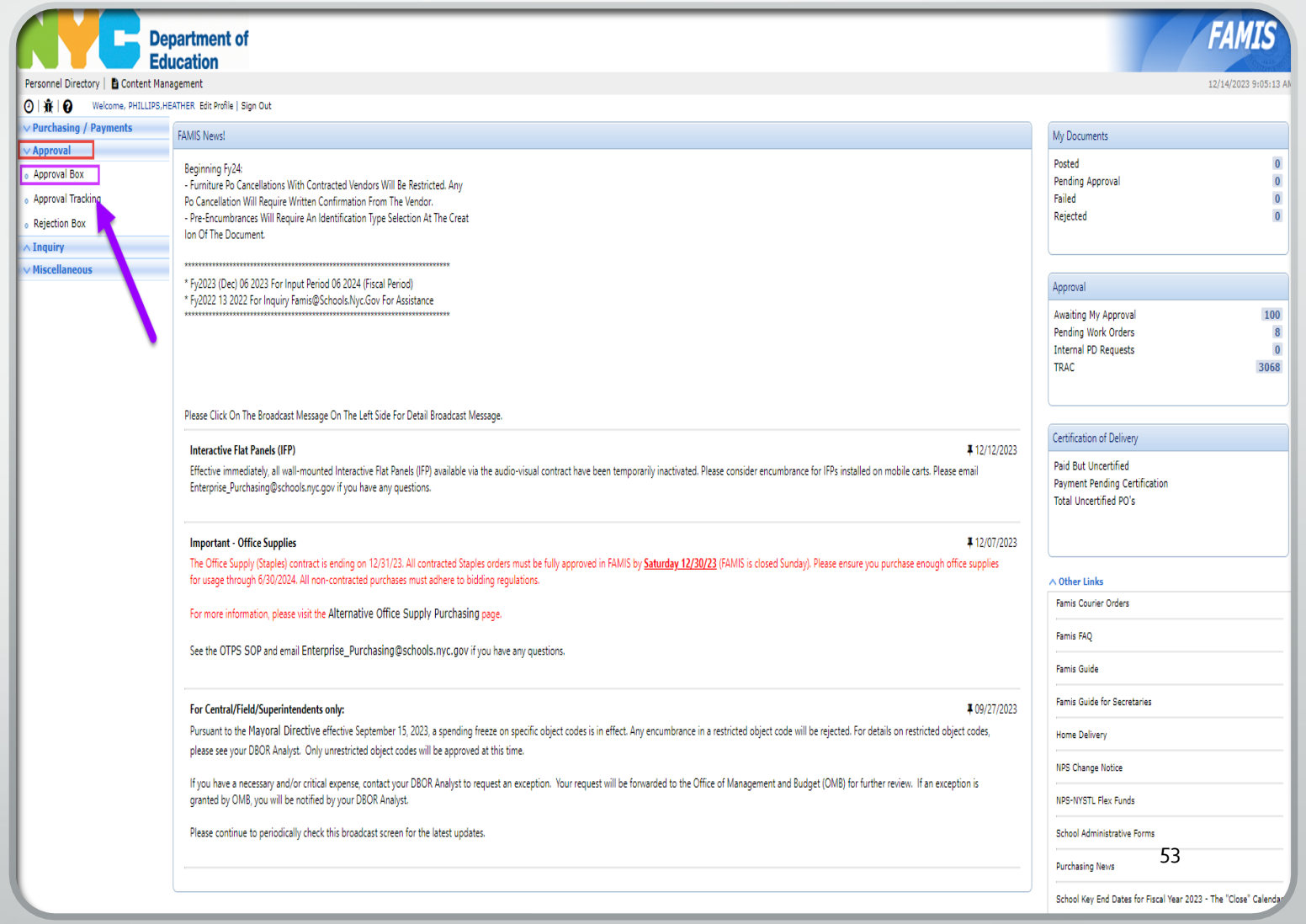
You will then see this screen stating that the TRAC was successfully submitted for processing.



TRAC Documents Awaiting FAMIS Approval

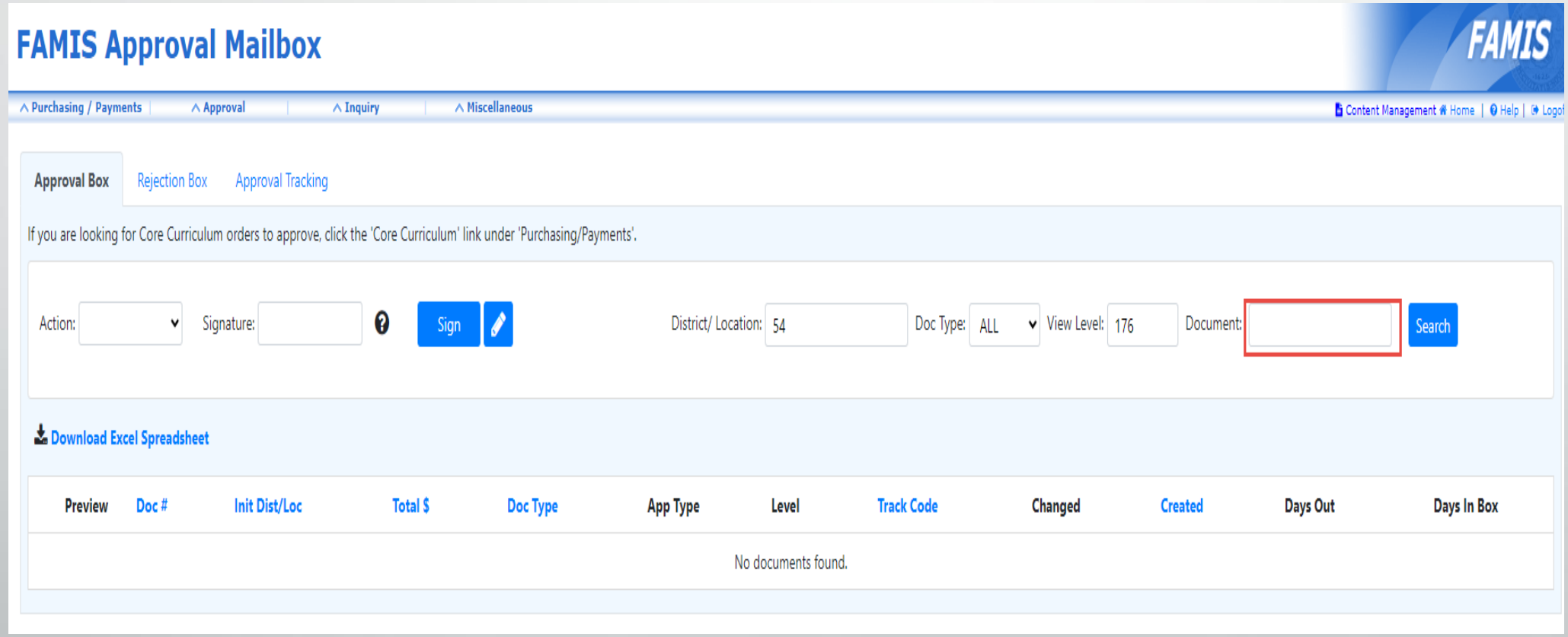
TRAC Documents Awaiting FAMIS Approval

Your TRAC approver will need to go into the FAMIS portal and approve the TRAC. It will be on the FAMIS home page under Approval -> Approval Box.



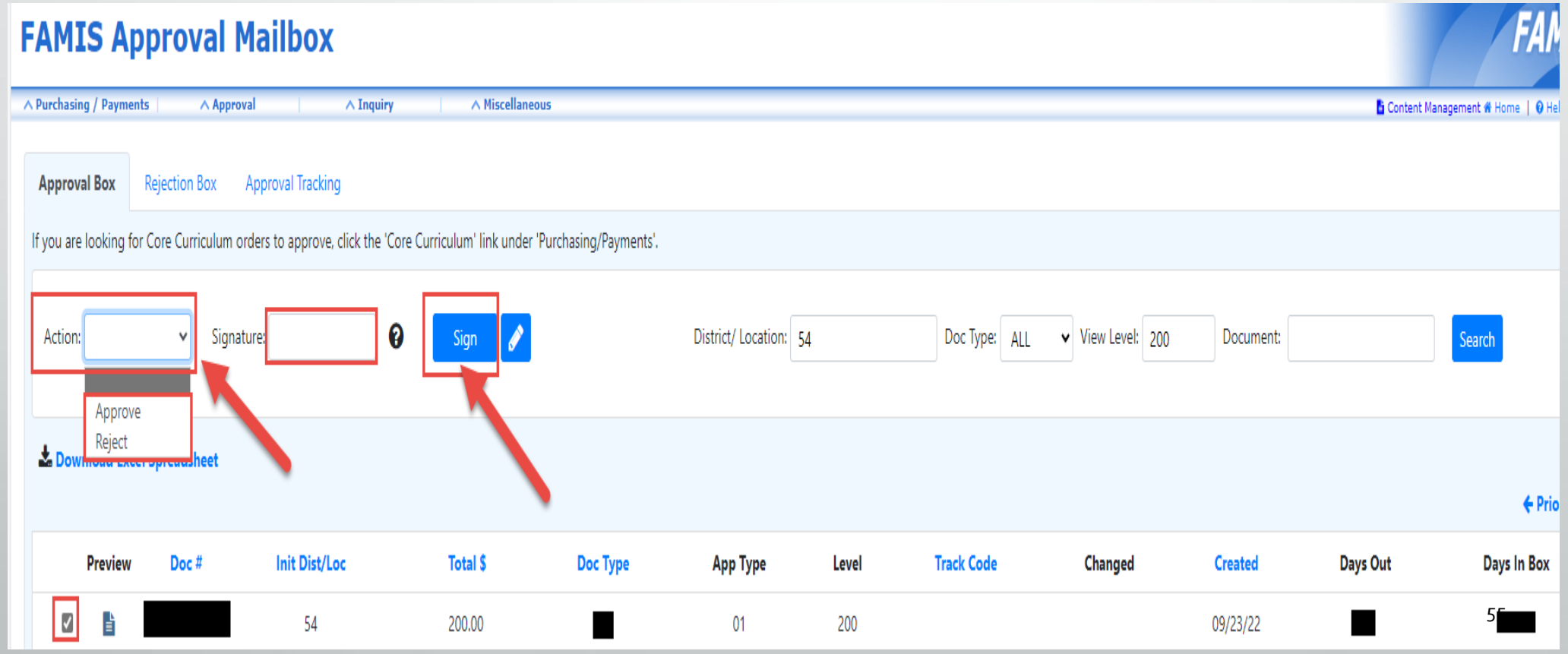
TRAC Documents Awaiting FAMIS Approval

Approval Box - Enter the document number you are looking for and hit search.



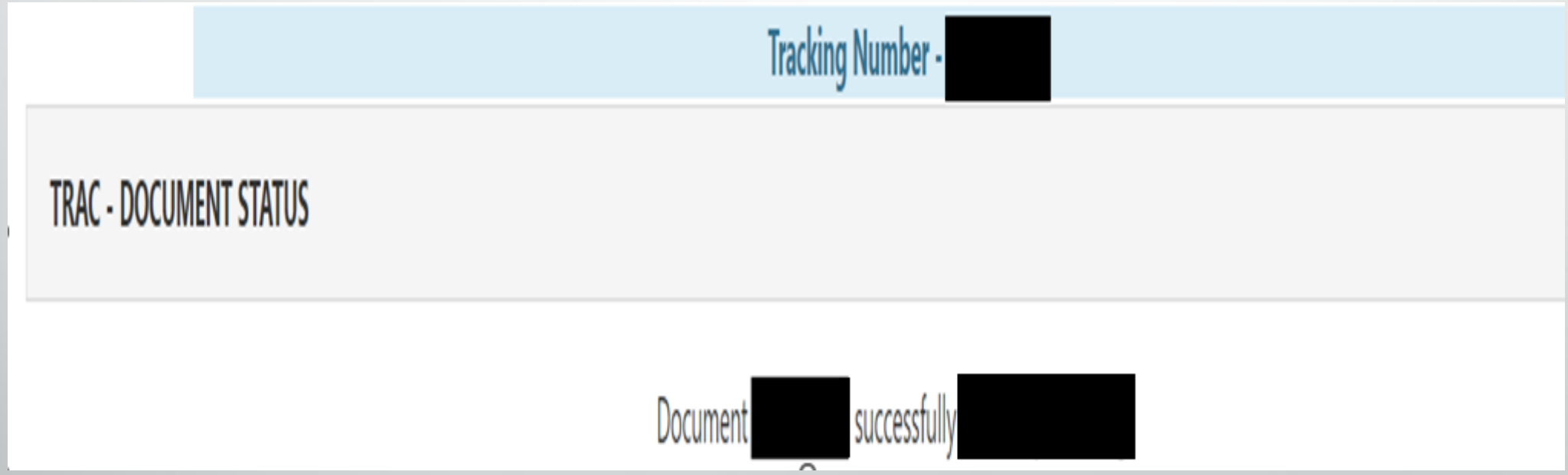
TRAC Documents Awaiting FAMIS Approval

The document will populate, and you can review the document. Once you are ready to approve, select the Action Box and "click" on Approve. You will then enter your signature and hit sign to process the document.



TRAC Documents Awaiting FAMIS Approval

The document will be submitted successfully and will be processed for payment within 7-10 business days.



RESOURCES

TRAC System

TRAC - Login (finance360.org)

Finance Service Center-Travel Unit

718-935-5000 Option 4

Travelunit@schools.nyc.gov

Standard Operating Procedures (SOP)

https://infohub.nyced.org/docs/default-source/doe-employees-only/standard-operating-procedures_otps.pdf

NYC Department of Education