

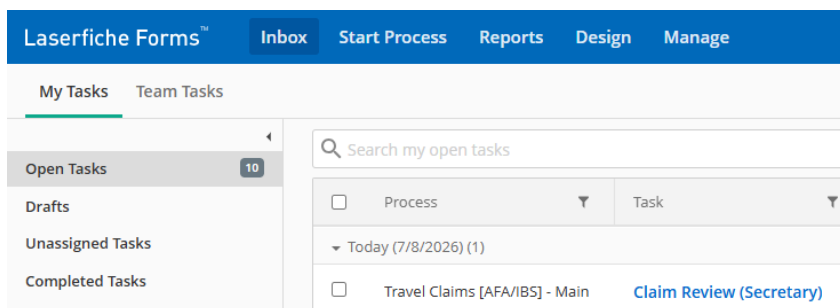
Travel Claims

Secretary Approver – How to Approve Travel Claims

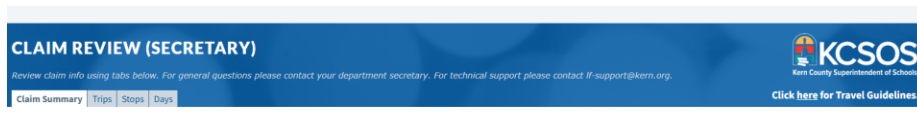
Step 1 – Begin the Secretary Approver Process

Once the employee/submitter submits a claim, the Secretary will receive an email notification with a link to the Laserfiche (LF) Inbox to review and approve.

1.1 From your LF Inbox, click Claim Review (Secretary)

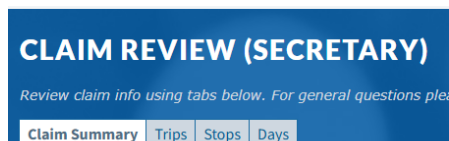


Step 2 – Claim Review Secretary Page



2.1 The Secretary shall review the details of the claim for accuracy

2.1.1 Details can be viewed by clicking on the tabs **OR**



2.1.2 Click on the View Summary button located in the Claim Summary Section for a snapshot view by Days, Stops, and Trips. To view any attachments related to the claim, you will have to view them directly from the Claim Review – Days tab.

Claim Summary

[View Summary](#)

When you click View Summary button, you will be directed to sign in using your computer login credentials.

CHRISTINA FABRIZIO Claim Summary (353535)

1 of 3
Automatic Zoom

Claim [353535] (Days)

Name	Vendor #	Job Title	Normal Work Site Location	Date Generated	Claim Total	Status
CHRISTINA FABRIZIO		EXECUTIVE SECRETARY I	CITY CENTRE	7/8/2026 2:19 PM	\$592.59	Pending

This section for Overnight Travel

Date	Trip Desc/Purpose	Miles	Trip Depart Time - 1st Date of Travel	Trip Return Time - Last Date of Travel	Breakfast Total	Lunch Total	Dinner Total	Lodging Total	Misc Expense	Misc Description
7/1/2026	7/1/26 - Site Visit	10.63	8:30 AM	11:20 AM						
7/6/2026	ABC Conference	277.94	6:00 AM		\$22.00	\$23.00	\$36.00		\$20.00	Parking (\$20.00)
7/7/2026	ABC Conference	277.75		7:00 PM	\$22.00	\$23.00	\$36.00			
Total Miles		566.32								
Total Mileage		\$410.59								

* = Custom ** = Over allowed Lodging *** = Advance Approval Form Required

\$44.00	\$46.00	\$72.00	\$0.00	\$20.00
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Claim [353535] (Stops)

Name	Vendor #	Job Title	Normal Work Site Location	Date Generated	Claim Total	Status
CHRISTINA FABRIZIO		EXECUTIVE SECRETARY I	CITY CENTRE	7/8/2026 2:19 PM	\$592.59	Pending

Trip Desc/Purpose	Stop Name	Depart Time	Depart	Arrive Time	Arrive	Miles
7/1/26 - Site Visit	To Greenfield USD	07/01/2026 8:30 AM	1300 17th St, Bakersfield, CA 93301, USA	07/01/2026 8:50 AM	1624 Fairview Rd, Bakersfield, CA 93307, USA	5.33
7/1/26 - Site Visit	Return to KCSOS	07/01/2026 11:00 AM	1624 Fairview Rd, Bakersfield, CA 93307, USA	07/01/2026 11:20 AM	1300 17th St, Bakersfield, CA 93301, USA	5.30
ABC Conference	To Sacramento	07/06/2026 6:00 AM	1300 17th Street, Bakersfield, CA 93301	07/06/2026 10:00 AM	1782Tribute Rd, Sacramento, CA 95815 (Overnight)	277.94
ABC Conference	Return KCSOS	07/07/2026 3:00 PM	1782Tribute Rd, Sacramento, CA 95815	07/07/2026 7:00 PM	1300 17th Street, Bakersfield, CA 93301	277.75

(Overnight) = Overnight Stop * = Custom Mileage

Claim [353535] (Trips)

Name	Vendor #	Job Title	Normal Work Site Location	Date Generated	Claim Total	Status
CHRISTINA FABRIZIO		EXECUTIVE SECRETARY I	CITY CENTRE	7/8/2026 2:19 PM	\$592.59	Pending

This section for Overnight Travel

Date	Trip Desc/Purpose	Miles	Trip Depart Time - 1st Date of Travel	Trip Return Time - Last Date of Travel	Breakfast Total	Lunch Total	Dinner Total	Lodging Total	Misc Amount
07/01/2026	7/1/26 - Site Visit	10.63	8:30 AM	11:20 AM					
07/06/2026 - 07/07/2026	ABC Conference	555.69	6:00 AM	7:00 PM	\$44.00	\$46.00	\$72.00		\$20.00
Total Miles		566.32							
Total Mileage		\$410.59							

\$44.00	\$46.00	\$72.00	\$0.00	\$20.00
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Step 3 – Trips, Stops, and Days Tabs

3.1 Alternatively, the Secretary can review the Claim information from the Trips, Stops, and Days Tabs.

Trips

Claim Summary

Trips

Stops

Days

[Click here for Travel Guidelines.](#)

TRIPS

Trip Desc/Purpose			TripID	Stops	Start	Time	End	Time
Meeting with CEO			4974	2	6/2/2026	9:00 AM	6/2/2026	5:00 PM
Breakfast	Lunch	Dinner	Lodging	Misc	Miles	Mileage Expense	Total Expense	
\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	57.13	\$ 41.42	\$ 41.42	

Trip Desc/Purpose			TripID	Stops	Start	Time	End	Time
Conference			4973	4	6/15/2026	10:00 AM	6/17/2026	5:00 PM
Breakfast	Lunch	Dinner	Lodging	Misc	Miles	Mileage Expense	Total Expense	
\$ 44.00	\$ 48.00	\$ 72.00	\$ 300.00	\$ 25.00	566.19	\$ 410.48	\$ 1,097.48	

This tab shows the Trip Info, amount of Stops per Trip, totals per Trip, Start and End Dates/Times and more.

If there are multiple Trips on the Claim, they will be listed here as well.

To view more detailed information such as Stops, and Mileage (Per Stop), review the Stops tab.

To view more detailed information such as Day Expenses, Misc Expenses, and Lodging Attachments, view the Days tab.

Stops

Claim Summary Trips Stops Days Click here for Travel Guidelines.									
STOPS									
Trip Desc/Purpose	Stop Name	Depart	Time	Depart Location	→	Arrive	Time	Arrive Location	Miles
	Stop Name	Depart	Time	Depart Location	→	Arrive	Time	Arrive Location	Miles
Meeting with CEO	Go To Wasco	6/2/2026	9:00 AM	Kern County Superintendent of Schools, 17th Street, Bakersfield, CA, USA	→	Wasco High School, 7th Street, Wasco, CA, USA	10:00 AM	28.73	
	Return	6/2/2026	4:00 PM	Wasco High School, 7th Street, Wasco, CA, USA	→	Kern County Superintendent of Schools, 17th Street, Bakersfield, CA, USA	5:00 PM	28.40	
Trip Desc/Purpose	Stop Name	Depart	Time	Depart Location	→	Arrive	Time	Arrive Location	Miles
	Stop Name	Depart	Time	Depart Location	→	Arrive	Time	Arrive Location	Miles
Conference	To Hotel	6/15/2026	10:00 AM	Kern County Superintendent of Schools, 17th Street, Bakersfield, CA, USA	→	3880 S Las Vegas Blvd, Las Vegas, NV 89109, USA	6:00 PM	279.95	
	To Conference	6/16/2026	7:30 AM	Resorts World Las Vegas, South Las Vegas Boulevard, Las Vegas, NV, USA	→	The Venetian Expo, Sands Avenue, Las Vegas, NV, USA	8:00 AM	3.39	
	Back to Hotel	6/16/2026	4:30 PM	The Venetian Expo, Sands Avenue, Las Vegas, NV, USA	→	Resorts World Las Vegas, South Las Vegas Boulevard, Las Vegas, NV, USA	5:00 PM	1.12	
	Return Home	6/17/2026	11:00 AM	Resorts World Las Vegas, South Las Vegas Boulevard, Las Vegas, NV, USA	→	Kern County Superintendent of Schools, 17th Street, Bakersfield, CA, USA	5:00 PM	282.32	
View Locations by: Lookup Address Bold = Overnight Stop Orange = Custom Mileage									

This tab shows information per stop. The Depart Date, Time, and Location, the Arrive Date, Time, and Location, as well as the mileage between each.

If an Arrive Location is Bold, this indicates the overnight stay.

If a Miles field is Orange, this indicates custom mileage was used (Instead of the mileage provided by Google Maps).

Days

Claim Summary | Trips | **Days** | [Click here for Travel Guidelines.](#)

Use "Next Trip" to navigate between multiple trips.

[Previous Trip](#) **Conference** [Next Trip](#)
 (06/15/2026 10:00AM - 06/17/2026 5:00PM)
 2 / 2

DAILY EXPENSES

Date	Breakfast	Lunch	Dinner	Lodging	Misc	Miles	Mileage
6/15/2026	\$ 0.00	\$ 23.00	\$ 30.00	\$ 200.00	\$ 0.00	279.58	\$ 200.47
6/16/2026	\$ 22.00	\$ 0.00	\$ 30.00	\$ 200.00	\$ 25.00	4.32	\$ 3.13
6/17/2026	\$ 22.00	\$ 23.00	\$ 0.00	\$ 0.00	\$ 0.00	282.32	\$ 204.68

Orange = Custom Red = Over allowed Lodging Purple = Advance Approval Form Required

MISC EXPENSES

Date	Expense	Description
6/10/2026	\$ 25.00	Parking expenses

[View Receipt](#)

LODGING ATTACHMENTS

Description
Hotel Receipt

[View Attachment](#)

Toward the top of this tab, you can navigate through the multiple Trips in the Claim.

For each Trip, this tab displays each date of the trip, as well as the Breakfast, Lunch, Dinner, and Lodging Expenses. The total Misc Expense Amount, Miles, and Mileage amount for that day is shown as well.

Misc Expenses are listed, and if a Receipt is provided, can be viewed by clicking the “View Receipt” Button.

Lodging Attachments are listed as well and can be viewed by clicking the “View Attachment” Button.

Step 4 – Account Details Section

4.1 The Secretary shall review the Account Details for the Claim.

Account Details
Enter the account code(s) below (required).

Program Account Code(s)	Percentage (Optional)	Amount	Available Balance
		\$	\$
+ ADD			

Fiscal Year
27

Total Percentage
0.00

Total Amount Allocated
\$ 0.00

Amount Discrepancy
\$ 592.59

4.2 The Secretary can adjust the Program Account Codes, as needed. The Account Code field will show Account Codes based on the Fiscal Year of the Claim in the Financial System.

Account Details
Enter the account code(s) below (required).

Program Account Code(s)

01-001-0000-0-5200.00-3500-8100-00-0000-000

01-001-8150-0-5200.00-0000-8100-00-0000-000

01-006-0000-0-5200.00-8600-2100-00-0000-000

01-008-0000-0-5200.00-8600-2100-00-0000-000

When Account Codes are changed on the page, or when the page is loaded, the Available Balance listed is pulled from the Financial System.

It may take a few hours for the Available Balance on the form to update, after changes are made in QSS. Claims that are in progress do not encumber or apply to the Available Balance. Only when the transfer is complete in QSS will the available balance change.

The Laserfiche Travel Claims process does not facilitate any Budget Transfer requests. Any existing procedures for Budget Transfers are still in effect and should be followed accordingly.

Email your budget transfer request to businessoffice@kern.org. Although there are insufficient funds, you can continue with the claim process. It is recommended to have advanced knowledge of which account codes to charge for this claim.

4.3 The Secretary can adjust the Amounts as needed. The Secretary can also use the Percentages field to auto-calculate the Amounts.

Program Account Code(s)	Percentage (Optional)	Amount	Available Balance
01-012-0000-0-5200-00-8600-2100-00-0000-000	50.00	\$ 21.34	\$ 347.00
+ ADD			

The Secretary cannot proceed unless the Amount Discrepancy is \$0.00.

Step 5 - Comment History Section

5.1 If the claim has Comments, the Secretary can view all the previous correspondence here.

Comment History
Expand to View Comments

Accountant (Michael Pizaro) - Correction (7/7/2026 5:12 PM)

Can you check if 01-375-1000-0-5200-00-8600-7200-00-0000-000 is correct, or 01-331 instead?

Secretary (William Shackelford) - Response (7/8/2026 8:18 AM)

Yes, we will use both 01-375 and 01-331. Thank You.

Step 6 – Accountant Routing Section

6.1 Select an Accountant from the drop-down menu

Accountant Routing

Select an Accountant

Step 7 - Approve Claim Section

Approve Claim

I Would Like To

- ☐ Approve Claim
- ☐ Refer Back Claim
- ☐ Cancel Claim

7.1 Select Approve Claim (there are no issues to resolve before submitting claim for reimbursement)

Approve Claim

I Would Like To

- ☒ Approve Claim
- ☐ Refer Back Claim
- ☐ Cancel Claim

Signature

☒ I agree that all information submitted on this travel claim is true, accurate, and adheres to the approved travel claim guidelines.

Signature *

Sign

Approve Claim

7.2 Select Refer Back Claim (for correction, or would like to ask for more information, for example: expense not allowed, remove expense, require receipt or explanation).

7.2.1 Select Refer Back Claim

7.2.2 Select Submitter or Employee (to take action)

Approve Claim

I Would Like To

- ☐ Approve Claim
- ☒ Refer Back Claim
- ☐ Cancel Claim

This Claim will be referred back for Corrections. Please select who to Refer Back to.

Refer Back To

Submitter

Employee

7.2.3 Enter reason for correction in the Comments field

7.2.4 Click on Refer Back to..... button

7.2.5 The claim will be routed for correction. Upon correction the claim will return to the Secretary for approval

Approve Claim

I Would Like To

- ☐ Approve Claim
- ☒ Refer Back Claim
- ☐ Cancel Claim

This Claim will be referred back for Corrections. Please select who to Refer Back to.

Refer Back To

Comments

Refer Back to Submitter

7.3 Select Cancel Claim (in the event you need to cancel the claim)

Approve Claim

I Would Like To

- ☐ Approve Claim
- ☐ Refer Back Claim
- ☒ Cancel Claim

This Claim will be Canceled, and no Reimbursement will be Processed. Please add a Cancellation Note below.

Cancellation Reason

7.3.1 Enter the reason for the cancellation in the designated field

7.3.2 Click Cancel Claim button

Cancel Claim

Step 8 – Submit Claim for further Approval

Once the claim is approved by the Secretary, it will move forward through the approval process by the Accountant, Supervisor, and Final Review by Accounts Payable.

8.1 As the claim moves through the approval process, it may be returned for further corrections. If so, an email notification will be sent to the appropriate parties for correction and resubmission.

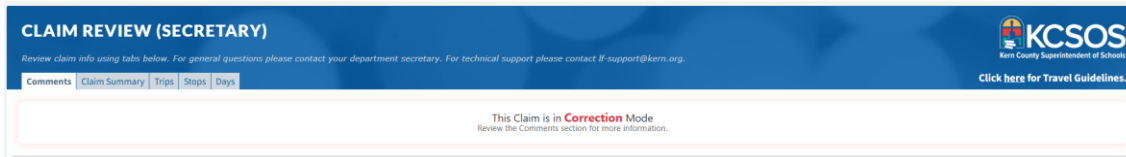
8.2 Once no further action is required, the claim will be processed for reimbursement by the designated deadlines determined by the Business Office.

Step 9 – Comment/Correction Mode

9.1 Final Review may return the Claim to the Submitter, Employee, Secretary, or Accountant for Corrections or Comments.

9.2 Final Review may also return the Claim to the Supervisor for Comments.

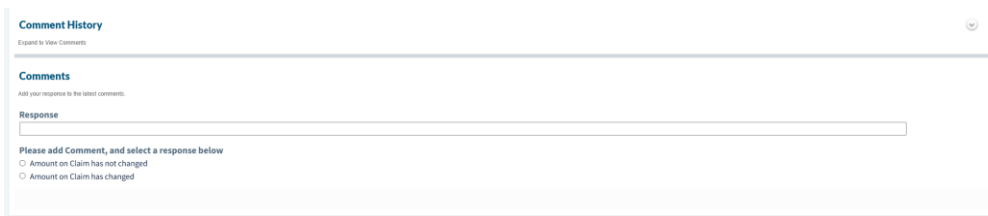
Correction Mode



The screenshot shows the top of the 'CLAIM REVIEW (SECRETARY)' interface. A blue banner at the top contains the title and navigation tabs: 'Comments', 'Claim Summary', 'Trips', 'Stops', and 'Days'. Below the banner, a red-bordered box contains the text: 'This Claim is in **Correction Mode**. Review the Comments section for more information.'

When a Claim is referred back to the Secretary for Corrections, a “Correction” Banner will appear at the top of the screen.

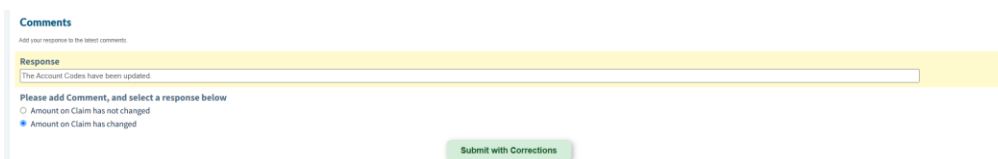
A new Comment Tab will be visible; this is where the Secretary can view and respond to the Comments.



The screenshot shows the 'Comment History' section. It includes a 'Comments' tab and a text area for adding a response. Below the text area, there are radio buttons for selecting a response: 'Amount on Claim has not changed' and 'Amount on Claim has changed'.

In Correction Mode, the Secretary can still make all the necessary changes they normally would when approving the claim. This includes changing the Account Codes.

9.3 The Secretary will need to add a response and send the Claim back to Final Review.



The screenshot shows the 'Comments' section. It includes a text area for adding a response. Below the text area, there are radio buttons for selecting a response: 'Amount on Claim has not changed' and 'Amount on Claim has changed'. A green button labeled 'Submit with Corrections' is visible at the bottom.

If the Amount on Claim has changed, the Claim will proceed to the Accountant.

Comment Mode

The screenshot shows the top section of the 'CLAIM REVIEW (SECRETARY)' interface. It features a blue header bar with the title 'CLAIM REVIEW (SECRETARY)' on the left, a navigation menu with tabs for 'Comments', 'Claim Summary', 'Trips', 'Stops', and 'Days', and the KCSOS logo on the right. Below the header, a message states: 'This Claim is in **Comment Mode**. Review the Comments section for more information.' A link for 'Click here for Travel Guidelines.' is also present.

When a Claim is referred back to the Secretary for Comments, a “Comment” Banner will appear at the top of the screen.

In Comment Mode, the Secretary **cannot** change the Account Codes or make any changes.

A new Comment Tab will be visible, this is where the Secretary can view and respond to the Comment from Final Review.

This screenshot displays the 'Comment History' and 'Comments' sections. The 'Comment History' section has a dropdown arrow. The 'Comments' section includes a prompt to 'Add your response to the latest comments.' and a text input field labeled 'Response'.

The Secretary can add a response and send the Claim back to Final Review.

The screenshot shows a 'Final Review' comment from Michael Pizarro dated 7/8/2026 3:03 PM, asking 'Can you please do a budget transfer and respond when complete?'. Below this, the 'Comments' section has a 'Response' field containing the text: 'Hello, the budget transfer is complete, and I am seeing the updated balances in Laserfiche.' A button labeled 'Return to Final Review (Comments)' is located at the bottom.