



Employee Expense Reimbursement Request Web Form Instructions

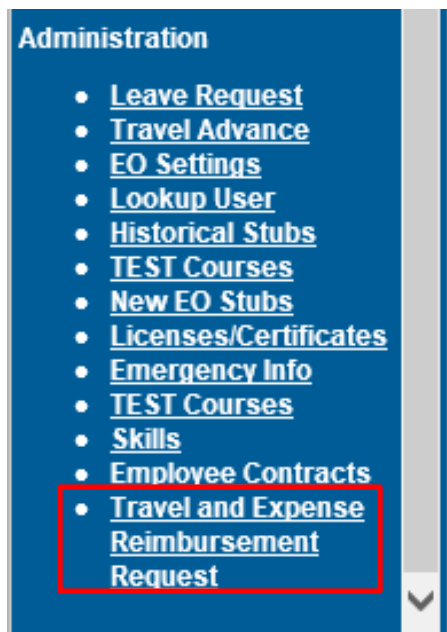
Introduction

The Employee Expense Reimbursement Request web form provides an efficient tool for district staff to quickly and easily submit requests for travel, mileage and other employee expense reimbursements. Use of this form is mandatory unless the employee does not currently have an employee ID, in which case they should continue to complete and submit the paper form. There are several distinct advantages to this web form:

1. The process is entirely paperless and electronic - it's better for the environment.
2. Approvals are accomplished electronically using workflow- this is far faster than forwarding paper forms.
3. Receipts, invoices and other supporting documentation is attached electronically at the time of submission, and available for review later.
4. Payment is faster - upon receiving the approvals, reimbursements will be deposited automatically to the employee's bank account, separately from payroll deposits.
5. Driving distances between district locations are calculated quickly using MapQuest, a dependable and well supported third party tool.
6. To the greatest extent possible, validation occurs at the time of data entry - only valid employee ID's, account numbers may be used.

Instructions for use

1. Access to the web form is available through the [Employee Online](#) on BusinessPlus. Select the **Travel Request and Expense Reimbursement Link**.



2. Login using your **Employee Online** ID and password.

Connect to ifas



User:
 Password:
[Forgot Login](#)

3. Written instructions and the district's processes governing employee expense reimbursements are available in the links below.

[Section 1.05 - Travel Procedures](#)

[Section 2.06 - Reimbursement Vouchers](#)

[Section 7.1 Reimbursement Vouchers](#) (ASB Manual)

4. Enter the request date. A pop-up calendar is available for your convenience.
5. Enter either your Employee Identification Number or three or more characters of your name. A drop-down pick list will appear displaying the employees containing the characters entered. Direct deposit is required in order to use this form. If you do not currently have direct deposit of your paychecks, please sign up through Employee Online.

approval and Expense Reimbursement Request - Internet Explorer

Request Date 11/06/2018	Employee tress 03923 TRESS, SONIA J 12209 TRESS, ANDREA MARIE	Request Type
Purpose of Trip and Destination or Comments Please enter reason for this trip		
Notes 		

6. Enter the request type:
 - a. Travel Authorization Request (prior approval) – pre-authorizes travel. This replaces the paper Travel Request form.
 - b. Travel Expense Reimbursement (pre-authorized) - submits the expenses incurred. This form replaces the paper Statement of Travel Request form.
 - c. Expense Claim – mileage reimbursements or other reimbursements. Mileage and transportation expenses replaces the paper Mileage form. Other expenses replaces the Reimbursement Voucher form.



Travel Prior Approval and Expense Reimbursement Request

Request Date

11/06/2018



Employee

12209 | TRESS, ANDREA MARIE

Request Type

- Travel Authorization Request (Prior Approval)
- Travel Expense Reimbursement (Pre-Authorized)
- Expense Claim

Purpose of Trip and Destination or Claim

Please enter reason for this trip

Notes

- Enter the purpose of the trip and destination or the description for the claim.
- A Notes section is provided for additional information needed.
- For the *Travel Authorization Requests* and *Travel Reimbursement Requests*, enter estimated departure date, departure time, return date and return time. If applicable, check the box if travel is out of Washington State or if a sub is required. Include the number of days the sub is needed, and the dates needed.

Departure Date

11/06/2018



Departure Time



Return Date

11/06/2018



Return Time



Out of State Travel

☐

Sub Required

☐

No. of Days

Dates Needed

Expenses

Actions	Date	Type	Purpose	Start Loc	End Loc	Qty/Mileage	Rate	Amount
+ ADD EXPENSE								0.00

Attachments

Actions	Description	Document
+ ADD ATTACHMENT		

SAVE AS DRAFT

RESET

SUBMIT

- Click on **ADD EXPENSE**.

11. Enter the date the transaction took place (e.g. mileage activity is the date of travel). A pop-up calendar is available for your convenience.

When entering mileage, the transaction date determines the mileage rate that is applied. For example, if the allowed rate changed on January 1st, and you entered two mileage transactions dated December 20th and January 4th the rate would be different.

For *Travel Authorization Requests* you are able to identify charges that are processed through a PCARD.

12. Select Type drop down. Depending on your selection, the Start Location, End Location, Mileage, Rate and Amount fields will either be available or masked off to assist you in entering your transaction correctly. For mileage between district locations please use Mileage - District. This web form uses MapQuest to determine driving distances.

Add Expense

Date

Enter Date Expense Anticipated/Occurred

Type

Mileage

Registration

Airfare

Baggage

Lodging

Transportation (Taxi, Shuttle, Uber, Parking, Tolls)

Breakfast-In State

Lunch-In State

Amount

☐ I will charge this expense to my P-Card.

CLOSE

SAVE

SAVE + ADD ANOTHER

13. Enter the **Purpose** of the transaction. This field is limited to about 24 characters (several characters of the Type will be concatenated with the entry when the transaction is created).
14. Enter the org key and object code to be charged in the specified fields. By entering four or more characters of the number or description a pick list will appear from which you may select the code. If you aren't sure which account number to charge, contact your office manager. The forms may be submitted without a code, but office managers cannot approve the form without providing this code.

Add Expense

Date

11/12/2018

Type

Other

Purpose

Enter Expense Description or Purpose (Max Length 25)

GL Org Key

finance

9713714200 | FINANCE DEPT STAFF

9713004299 | CONTINGENCY FINANCE

9713717200 | DIR FINANCE & OPERATIONS

9715714200 | FINANCE DEPT RECORDS STAFF

9772717200 | FINANCE DEPT DATA PROCESSING

CLOSE

SAVE

SAVE + ADD ANOTHER

15. If you have any receipts or invoices related to your request, scan and save them. Scan all documents in color at 300 DPI, and then select the **ADD ATTACHMENT** button. The Attachment window will then display.
16. Drop and drag or select **click upload** and locate and select the image you wish to attach. Upon return change the description if desired and select **SAVE** or **SAVE + ADD ANOTHER**. Repeat this process until all supporting documents have been attached.

Add Attachment ×

Description

Receipt

File

Drop files here or click to upload

CLOSE

SAVE

SAVE + ADD ANOTHER

17. Upon return, you may view your attachments by selecting the View button to the right of the attachment description.
18. Upon completion of your request, select **SUBMIT** from the task bar at the bottom of the screen.
19. If the form is not complete you can select **SAVE AS A DRAFT**. An email will be sent with a link to the form for you to complete at another time.

Approval and Expense Reimbursement Request - Internet Explorer

Notes

Expenses

Actions	Date	Type	Purpose	Start Loc	End Loc	Qty/Mileage	Rate	Amount
+ ADD EXPENSE								0.00

Attachments

Actions	Description	Document
Q	Receipt	pdfexport.pdf

+ ADD ATTACHMENT

SAVE AS DRAFT

RESET

SUBMIT

20. Workflow will now route your request to your office manager and others for review and approval. Once all approvals have been received, the necessary transactions will be automatically generated in BusinessPlus. You should receive an email indicating your request has been approved and will be paid in the near future.