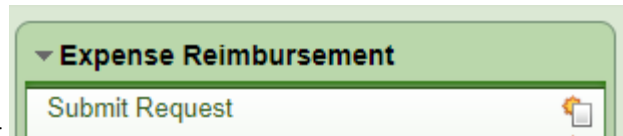
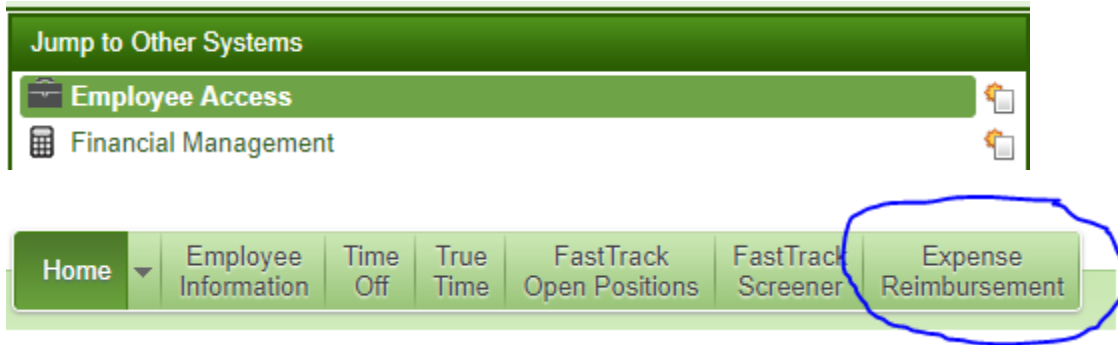
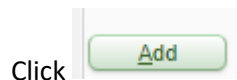


TRAVEL

To enter an Expense Reimbursement Request, you must go to **Employee Access** in Skyward. This is on the far right side of the **home screen**.



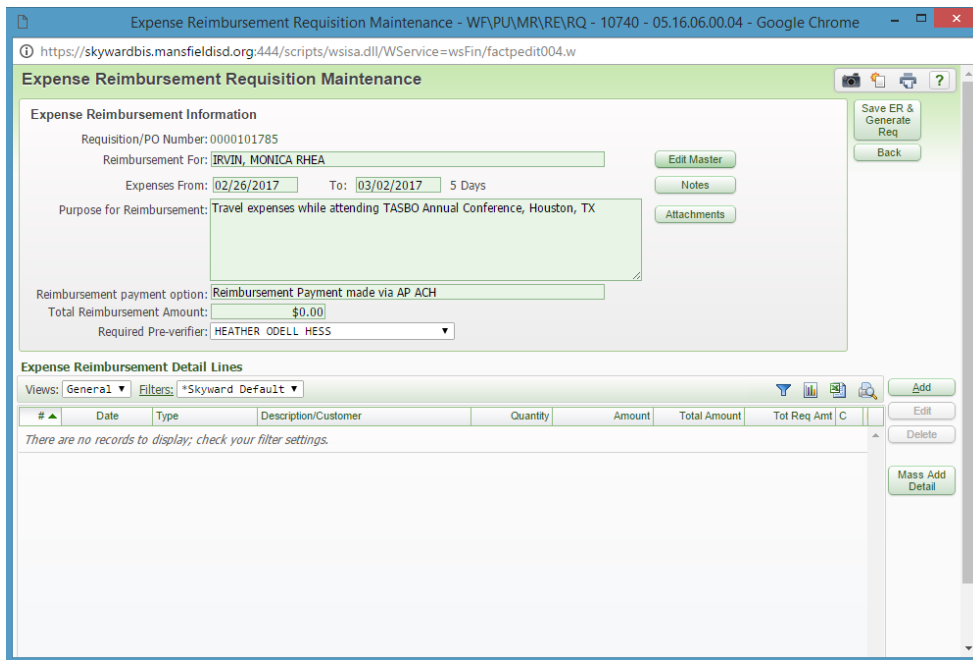
Select Expense Reimbursement, then Submit Request



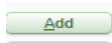
Click

A screenshot of the "Expense Reimbursement Request Maintenance" form in a web browser. The browser title is "Expense Reimbursement Request Maintenance - 05.17.06.00.11 - Google Chrome". The URL is "https://skywardbis.mansfieldisd.org:444/scripts/wsisa.dll/WService=wsFin/factpedit003.w?isPopup=true". The form has a green header with the text "Expense Reimbursement Request Maintenance". Below the header, there are two buttons: "Save" and "Back". The main form area is titled "Add Expense Reimbursement Request". It contains several fields: "Reimbursement For:" with the value "IRVIN, MONICA RHEA"; "* Expenses From:" with the value "10/13/2017"; "* To:" with the value "10/13/2017"; "* Purpose for Reimbursement:" with a large text area; "Reimbursement payment option:" with the value "Reimbursement Payment made via AP ACH"; and "District Payment Reimbursement information:" with the text "All expense reimbursement payments will be made via ACH to your bank account set up with the District." Below the form, there is a note: "Asterisk (*) denotes a required field".

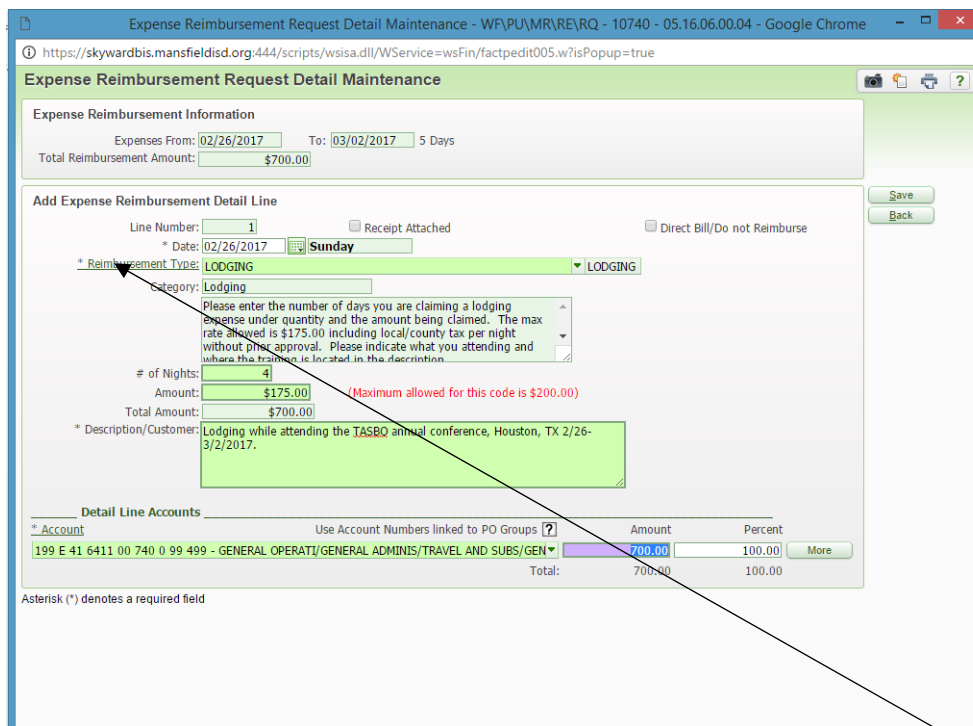
VERY IMPORTANT—ENTER YOUR CAMPUS NAME OR DEPARTMENT NAME AT THE VERY BEGINNING OF THE DESCRIPTION (i.e. ATHLETICS—LEGACY). Then enter your travel dates and purpose for the reimbursement with the what, where, when, why thought process (i.e. Travel to ____ on October 13, 2017 to attend (name of workshop or meeting) at the Region XI) then click **SAVE**. **In this description is where you will also put any budget restrictions.**



You can either add one item at a time by clicking



Or you can do multiple line items by clicking



Enter the date of travel/expense. Select the Reimbursement type from the drop down list. You will then enter the quantity of the item, the amount, the description, and the account code to be charged. You have the ability to spread to multiple account codes that you have access to by clicking on the “more” button and entering the % or dollar amount allocated to that code. **NOTE: BE SURE TO READ THE INSTRUCTIONS FOR EACH CATEGORY AS IMPORTANT INFORMATION IS CONTAINED IN THAT INFORMATION BOX BUT YOU WILL HAVE TO SCROLL DOWN TO READ**

Click “Save” when you are complete with this line item. You can continue to add items until you are complete with your expense line items.

Expense Reimbursement Information

Requisition/PO Number: 0000101785
 Reimbursement For: IRVIN, MONICA RHEA
 Expenses From: 02/26/2017 To: 03/02/2017 5 Days
 Purpose for Reimbursement: Travel expenses while attending TASBO Annual Conference, Austin, TX
 Reimbursement payment option: Reimbursement Payment made via AP ACH
 Total Reimbursement Amount: \$1,097.40
 Required Pre-verifier: HEATHER ODELL HESS

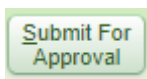
Expense Reimbursement Detail Lines

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	Tot Req Amt	C
1	02/26/2017	LODGING	Lodging while attending the TASBO annual conference, Austin, TX 2/26-3/2/2017.	4.0000	175.0000	700.00	700.00	L
2	02/27/2017	FULL DAY MEAL AL	Full day meal allowance	1.0000	51.0000	51.00	51.00	M
3	02/28/2017	FULL DAY MEAL AL	Full day meal allowance	1.0000	51.0000	51.00	51.00	M
4	03/01/2017	FULL DAY MEAL AL	Full day meal allowance	1.0000	51.0000	51.00	51.00	M
5	02/26/2017	PARKING	5 days parking	5.0000	10.0000	50.00	50.00	O
6	02/26/2017	MILEAGE REIMBUR	Mileage to Austin	180.0000	0.5400	97.20	97.20	G
7	03/02/2017	MILEAGE REIMBUR	Mileage from Austin to Mansfield	180.0000	0.5400	97.20	97.20	G

Attachments such as your conference agenda/certificate of attendance/name badge/game bracket and Google maps/MapQuest showing mileage, you will scan and attach to your request by clicking on the **Attachments** and if you need to enter any special notes, you can enter them by clicking **Notes**. Notes would include if the room was shared with other employees or if traveling on federal funds, the grant objectives from the DIP/CIP.

The following attachments **must be included** with the request or it will be returned (preferably one attachment with everything included):

- 1) Conference flyer/agenda/certificate of attendance/name badge/game bracket, etc. validating your reason to travel and attendance – saved as a pdf.
- 2) Directions from Google maps or MapQuest showing miles being claimed – saved as a pdf.
- 3) Hotel invoice/receipt (required if an overnight stay; GSA published rate for locale if hotel rate > \$94) – this should be done ahead of time on a purchase order to Travel/Hotel
 - a. **If room rate is over the GSA rate, then an email approval from the executive council member is required to be attached to the expense reimbursement.**
- 4) Parking, Uber, taxi, etc. receipts – saved as a pdf



When your entry is complete, you will click

ONCE SUBMITTED WHAT HAPPENS

Once submitted it starts the approval path depending on the account used and your supervisor. If exceeding the GSA rate for lodging, the expense reimbursement will need to be routed to the executive council member by the campus/department principal/administrator. It will also be verified by the business office. Once all approvals are in place, the accounts payable department will receive notification that it is ready to be processed. At that point it will go in the next run they have and the funds will be deposited to your account. You will also receive an email that funds have been deposited to your account.

TO CHECK THE STATUS (why was expense reimbursement denied?)

You can return to the submit request screen to view the status of your reimbursement request by highlighting your request and expanding and clicking on the triangle on the far left side. There you can check the approval status to see where it is in the process as well as view denial notes from any of the approvers.