Entry Point: Create Employee Advance/ Reimbursement Request

DISTRICT WILL <u>NOT</u> ISSUE EMPLOYEE ADVANCEMENTS

Fiscal Year:
> Year is auto populated, or use the drop down to select the year.

Reipient:
> Enter name or ID number, or use the icon to lookup the employee being reimbursed.

Request Type:
> Use drop down menu, select request type.

Supporting Documentation:
> Attached
> *(You will not be able to submit the request until you attach a file)*

Payment Type:
> Direct Deposit

Route Check:
> Electronic

Reference:
> Enter invoice number, store name with the date/year, or mileage month
> *(Reference number will turn in to the invoice number once submitted)*

Need Separate Check?:
> *Do not check this box*

Justification:
> Enter purpose of request

Needed By:
> Enter date, check printing ONLY occurs on Wednesdays (allow two weeks for processing)

Event Date:
> Enter date of Event, or invoice date

Amount:

      Enter information

Description:

*Enter item description using this format: **Vendor name/ reason for the purchase***

Accounts:

      Click on window icon to bring up the account pop up – enter account number

           (To split accounts: scroll the Grey bar to the right, click on the plus icon)

      Enter account number

      Click Okay

Add multiple invoices to a reimbursement:

      Click on the plus icon – this will bring up another line

Drop or Upload supporting documentation:

      Click Upload button

      Or

      Drop files

Use the drop down to select the Type of attachment

ATTACH EACH INVOICE/ DOCUMENT SEPARATELY

Click Submit