

## Instructions for Submitting Expense Reimbursement Requests

### This process is used to submit reimbursement requests for:

- Travel-related out-of-pocket expenses while traveling overnight for our district – ex. Per Diem, Baggage, Mileage, Airport/Hotel Parking, etc.
- ELL Praxis Test Fees
- In-District and Out-of-District Mileage
- CDL Reimbursements
- Other reimbursements w/prior approval from your Principal/Administrator

*Please note: All expense reimbursements must be submitted in a timely manner. All prior fiscal year expense reimbursement requests must be approved by your supervisor.*

### To enter an Expense Reimbursement request in Skyward, go to:

- Employee Access
- Click on Expense Reimbursement tab
- Select Submit Request
- Select Add

Be aware if you see an \*, it is a required field

- Enter the date range for your expenses/trip
- Fill in the Purpose of Reimbursement
  - Conference Travel – Include the name of the conference, destination location, time you left home and arrived back home, etc.
  - Mileage, ELL Praxis Tests, etc. – Include a brief description, such as: Out of District Mileage for November, Reimbursement for Food for Conferences, etc.
- Choose ACH or Paper Check - You will get your money quicker if you leave it on ACH. This reimbursement goes through Accounts Payable and not Payroll. It will not be included on your paycheck.
- If you see a drop-down menu underneath the ACH/Paper Check area, you need to choose who to send the reimbursement request to for approval. Who you pick will depend on what funding source is paying for your reimbursement:
  - Osiris Nesbitt – Grants, ELL Praxis, Curriculum
  - Dr. Dawn Gresham – Sped
  - Dara Hennessy – PDC
  - Your Principal/Supervisor – Your Building's Funds (ex: 06/General Fund)
- Click Save

On the next screen, click Add on the mid-right to add all of the different expenses for which you need to be reimbursed.

Use either the drop-down menu or click on the words \*Reimbursement Type” for a list of all of your reimbursement options:

- Miscellaneous Reimbursements – Keep in mind that you will not be reimbursed for sales tax
- Mileage – Separate out In-District vs. Out-of-District mileage. Refer to Form #26 to keep track of your in-district mileage each month.
- Per Diem (Overnight Trips Only)
  - Choose whether you ate your meal in a High Cost or Low Cost State:
    - High Cost States: AZ, CA, CO, CT, DC, FL, GA, IL, LA, MA, MD, MI, NV, NJ, NM, NY, OH, PA, RI, SC, TX, VA, WA
    - Low Cost States: All Other States
  - On travel days, use your time of departure from home and your time of arrival back home to figure out which meals qualify for per diem:

- Breakfast: Depart for destination before 6 am or arrive back home after 6 am to be able to claim breakfast
- Lunch: Depart for destination before 11 am or arrive back home after 11 am to be able to claim lunch
- Dinner: Depart for destination before 5 pm or arrive back home after 5 pm to be able to claim dinner

Pay attention to where you were at each meal time. If you were at the airport in Wichita for breakfast, but by lunch time you were in Florida, you would use the lower Kansas rate for breakfast and the higher Florida rate for lunch

- o On all full conference days, claim all three meals unless a meal was provided by your hotel or by the conference: ex. free hotel continental breakfast, conference lunch, etc.. Please attach a copy of the conference brochure or agenda that shows which meals are provided.
  - Fill in the quantity, amount and a description for the reimbursement
- o Add the accounting code. If you don't know what it is, look at the code on your Anticipated Absence paperwork, or check with your building secretary. The code is different for In-District vs. Out-of-District mileage reimbursements. Be sure you pick the correct code.
- o Save
- o Continue adding all expenses that need to be reimbursed.
- o Use the Attach button at the top to attach receipts, mileage forms, etc.
  - You must provide receipts for baggage, parking, tolls, shuttle/taxis, etc. If you have lost your receipt, then you need to provide a copy of your bank/credit card statement showing you paid for it.
  - You do not need to provide receipts for meals covered under per diem.
- o When you are done, click the Submit for Approval button on the upper right

You will be brought back to the Submit Request screen.

- o If your request is in WIP status (Work In Progress), then it still needs to be Submitted for Approval.
- o If your request is in WFH status (Waiting For Higher approval), then it has started the approval process. You can still delete it or add attachments at this point.
- o Click on the triangle on the far left of the line for more information. You can expand out the different lines to see things such as who still needs to approve it.

After your reimbursement request is approved, it will be sent to Accounts Payable for processing. It is generally processed within one week of being completely approved. If you choose to receive your money via ACH, then you will receive a Skyward-generated email letting you know when the payment has been sent to your bank.