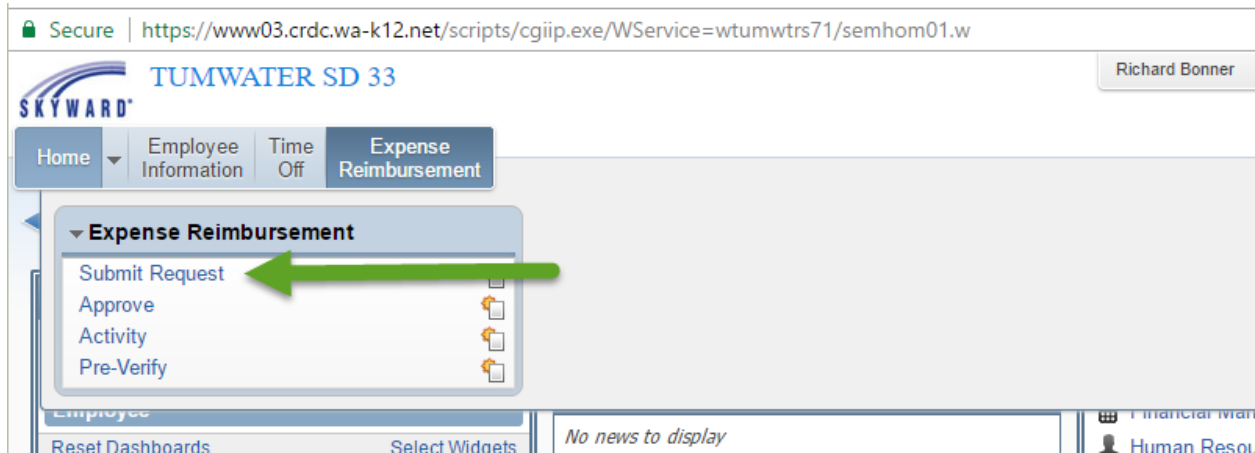
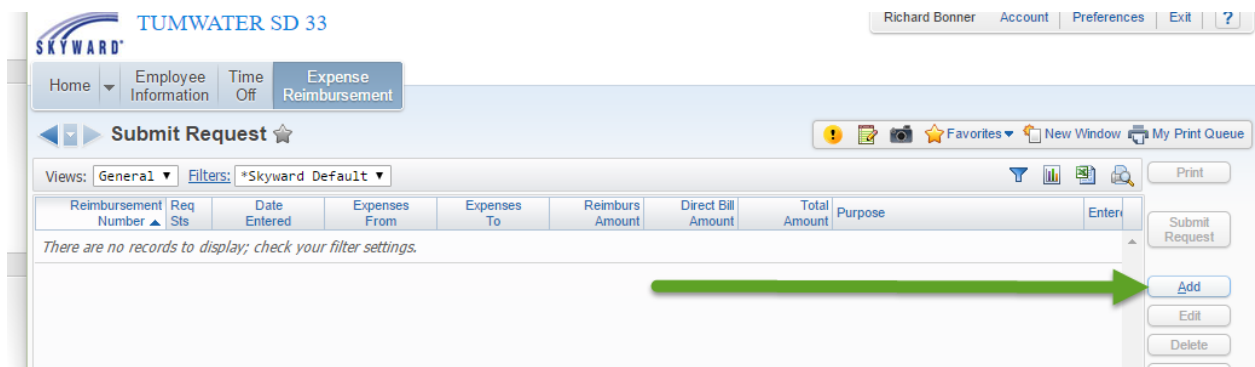


1. If this is your first expense claim in Skyward, you will need to email [Michelle Napoleon](#) in Financial Services to be set up. Please include your assigned site along with your request email. Once you are set up, you will be notified that you can proceed with your claim.
2. In Skyward, go to the **Employee Access**. Select the Expense Reimbursement tab, then “Submit Request”.



3. Click “Add” to start a new claim.



4. Select the date range for your claim and add a purpose (e.g. August 2021 expenses - if you are claiming for the entire month or more specific if you are claiming for a specific event/purchase). Tabbing through each field helps insure you don't miss one. **Watch for asterisks** – these are required fields.

 A screenshot of the 'Expense Reimbursement Request Maintenance' form. The form is titled 'Edit Expense Reimbursement Request'. It contains several fields:

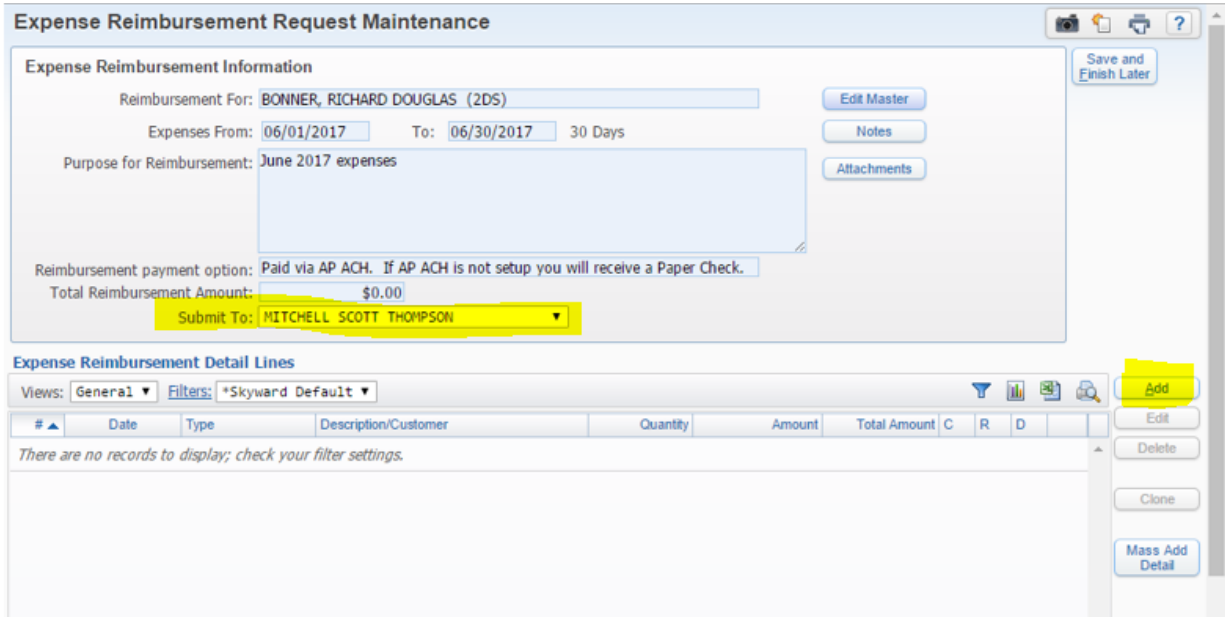
- 'Reimbursement for:' with the value 'NAPOLEON, MICHELLE L (20A)'
- '* Expenses From:' with the value '08/02/2021' and a calendar icon.
- '* To:' with the value '08/02/2021' and a calendar icon.
- '* Purpose for Reimbursement:' with the value 'Office supplies'.
- 'Reimbursement payment option:' with the value 'Paid via AP ACH. If AP ACH is not set up you will receive a Paper Check.'
- 'District Payment Reimbursement information:' with the text 'Accounts Payable is run weekly. If your approved reimbursement is received by Friday, it will be paid the following Friday.'

 There are 'Save' and 'Back' buttons on the right side of the form.

Asterisk (*) denotes a required field

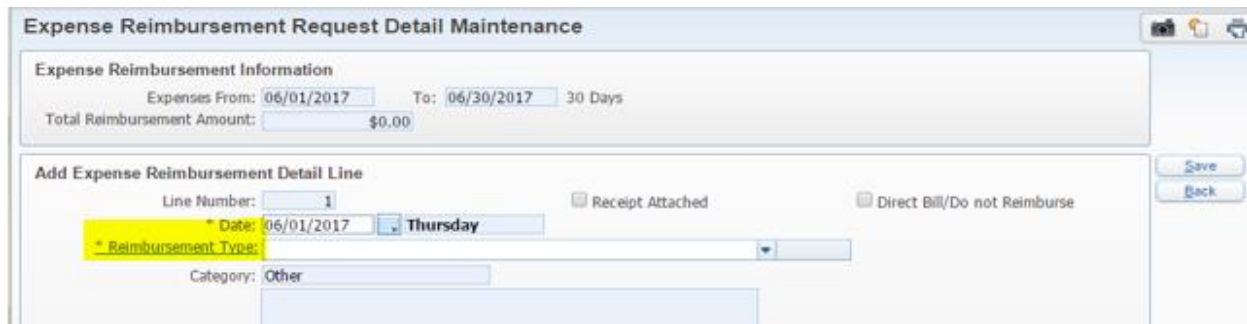
5. Add detail lines of items being claimed:

NOTE: If there is an option to submit your claim to more than one person (**Submit To:**), please select the appropriate person that should be receiving and coding your claim (this will most often be your department Office Professional/site Secretary).



The screenshot shows the 'Expense Reimbursement Request Maintenance' window. The 'Expense Reimbursement Information' section includes fields for 'Reimbursement For:' (BONNER, RICHARD DOUGLAS (2DS)), 'Expenses From:' (06/01/2017) to 'To:' (06/30/2017) for 30 Days, and 'Purpose for Reimbursement:' (June 2017 expenses). The 'Total Reimbursement Amount' is \$0.00, and the 'Submit To:' dropdown is set to MITCHELL SCOTT THOMPSON. The 'Expense Reimbursement Detail Lines' section is currently empty, with a message 'There are no records to display; check your filter settings.' The 'Add' button is highlighted in yellow.

6. After clicking “add” to add detail (step 5 above), select the date of the detail (e.g.: date of purchase or date driven) and select the *Reimbursement Type from the drop down list:



The screenshot shows the 'Expense Reimbursement Request Detail Maintenance' window. The 'Expense Reimbursement Information' section is identical to the previous screenshot. The 'Add Expense Reimbursement Detail Line' section is active, showing 'Line Number:' (1), 'Date:' (06/01/2017) with a dropdown set to 'Thursday', and '* Reimbursement Type:' dropdown. The 'Category:' is set to 'Other'. The 'Save' and 'Back' buttons are visible on the right.

7. Select the type of expense:

Code	Description	User Defined Amount Label	UD Amt Type	Default Amount	Amt Edit	Max Amount	User Defined Quantity Label
Brkfast	Breakfast	Amount	Decimal 2 Places	\$17.00	N	\$0.00	Quantity
Dinner	Dinner	Amount	Decimal 2 Places	\$31.00	N	\$0.00	Quantity
Lunch	Lunch	Amount	Decimal 2 Places	\$21.00	N	\$0.00	Quantity
Lunch N	Non Travel Lunch	Amount	Decimal 2 Places	\$21.00	N	\$0.00	Quantity
Mile202	Mileage 2021	Amount	Decimal 2 Places	\$0.56	N	\$0.00	Quantity
MISC	Miscellaneous - See Attached	Amount	Decimal 2 Places	\$0.00	Y	\$0.00	Quantity

- Breakfast/Dinner/Lunch – must be a valid meal claim not served by your hotel or conference
- Mileage – be sure the date entered is/are the actual date/s driven to insure the proper mileage rate is reimbursed. Quantity will be the number of miles. Describe reason for miles claimed. If claiming miles for more than one or two days, please keep track on an Excel Spreadsheet (one is available on the [Financial Services web page](#)). If using a spreadsheet, there is no need to enter each day in Skyward. Select one day in the month (the last day of the month driven is a good choice). Enter your total mileage for the month on that one date. Attach the Excel spreadsheet in Excel format (not PDF) for the detailed documentation.

Expenses From: 06/01/2017 To: 06/30/2017 30 Days
Total Reimbursement Amount: \$14.98

Add Expense Reimbursement Detail Line

Line Number: 1 Receipt Attached Direct Bill/Do not Reimburse

* Date: 06/09/2017 Friday

* Reimbursement Type: Mileage 2017 Mile2017

Category: Mileage Reimbursement

Quantity: 28.00
Amount: \$0.5350
Total Amount: \$14.98

* Description/Custom: travel to LRE

Detail Line Accounts

* Account	Account Selection	Amount	Percent
10 E 530 9790 13 8000 930 0000 0000 - GF/EXP/DO GENERAL/TRAVEL/FIN SERV OFFICE/--/MIS		14.98	100.00
Total:		14.98	100.00

- Miscellaneous - If adding a miscellaneous expense (any expense that is not a meal or mileage) you will need to attach a detailed receipt. When attaching a receipt, check the “Receipt Attached” box

Edit Expense Reimbursement Detail Line

Line Number: 1 Receipt Attached Direct Bill/Do not Reimburse

* Date: 08/02/2021 Monday

* Reimbursement Type: Miscellaneous - See Attached MISC

Category: Other

Select an account code from the drop down menu - **any account is fine**. Your claim will route to your approving Office Professional who will then select the actual account code to use.

Once all detail line information has been input, click the “Save” button.

- Attach receipts if required (all miscellaneous claims). Click on the “Attachments” button:

Expense Reimbursement Request Maintenance

Expense Reimbursement Information

Reimbursement For: BONNER, RICHARD DOUGLAS (2DS)

Expenses From: 06/01/2017 To: 06/30/2017 30 Days

Purpose for Reimbursement: June 2017 expenses

Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check.

Total Reimbursement Amount: \$0.00

Buttons: Edit Master, Notes, Attachments, Save and Finish Later

Then click “Add File”:

Expense Reimbursement Request Attachments

Available Attachments for Exp Reimbursement #0000000960

Type	Description	Entered By	Entered Date	Entered Time	File Size	Original File Name
There are no records to display; check your filter settings.						

Buttons: View Attachment, Add File, Add Link, Edit, Delete, Back

Select the type of attachment (“Attachments” or “See Receipt”) and add a description. Choose the file (e.g. the scan of your original, detailed receipt or excel mileage document), then click save. Keep original receipts until you have received payment for reimbursement. Once payment is received, receipt can be discarded.

Expense Reimbursement Request Attachments

Add Expense Reimbursement Request Attachment

* Type: SEE RECEIPT Expense Reimbursement Request

Entered Date: 08/06/2021

Entered Time: 1:23 PM

Entered By: MICHELLE L NAPOLEON

Description: Office supplies

* Attached File: Choose File No file chosen

Buttons: Save, Back

- Once all details are entered, click “submit for approval” to submit your claim for approval. If “Submit for Approval” is not an option on your screen, you have missed a field. If updating your claim throughout the month, click save and finish later to add to your claim throughout the month.

Expense Reimbursement Request Maintenance

Expense Reimbursement Information

Reimbursement For: NAPOLEON, MICHELLE L (20A)

Expenses From: 04/09/2019 To: 04/09/2019 1 Day

Purpose for Reimbursement: Ready for submission

Reimbursement payment option: Paid via AP ACH. If AP ACH is not set up you will receive a Paper Check.

Total Reimbursement Amount: \$0.58

Buttons: Edit Master, Notes, Attachments, Submit For Approval, Save and Finish Later

Expense Reimbursement Detail Lines

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	C	R	D
1	04/09/2019	Mileage 2019	Details and code added - saved - now submit for approval to finish submitting your claim	1.0000	0.5800	0.58	G		

Buttons: Add, Edit, Delete, Clone

If you have any questions or need assistance, please contact Michelle Napoleon 360-709-7017 or michelle.napoleon@tumwater.k12.wa.us