How to Submit an Employee Expense Reimbursement

- 1. Log into ERMA and click on the Expense Reimbursement tab at the top of the screen
- 2. Select Submit Request

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- 3. Select Add on the right-hand side of the screen.
- 4. Select the period of time you are requesting expense reimbursements for. Enter a description for your expenses. Please note: You'll be adding each expense separately which will give a more detail than this initial description.

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Expense Reimbursement Request Maintenance	1
Add Expense Reimbursement Request	Save
Reimbursement For AUNE, HEATHER C (COS)	Back
* Expenses From: 03/01/2015 * To: 03/31/2015	
* Purpose for Reimbursement: Expense Reimbursement for March 2015	
Reimbursement payment option: Reimbursement Payment made via AP ACH	
District Payment Reimbursement information: Please include all locations of travel and mileage.	
Asterisk (*) denotes a required field	

- 5. Click Save.
- 6. The screen shown below will appear. If you do not know what budget code to use, **select the pre-verifier in your building** (please select your appropriate administrative assistant from the drop down menu). This person will be able to edit the budget code for your request.

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- 7. Select Add .
- 8. The screen below will appear.



- 9. If the expense you are listing is for mileage, you will not attach a receipt. For all others, you will and the box should be checked next to "Receipt Attached"
- 10. Select the reimbursement type.
- 11. Enter the dollar amount in the "Amount" field.
- 12. Please note: Sales tax is reimbursed only for restaurants and travel expenses.
- 13. Enter a description of the expense, noting what the item/service was for. Please use words that explain more than the basic description. Example "Supplies for Algebra class", instead of just "supplies".
- 14. If you know the account number, enter it under "Account". If you do not know what budget code should be used, **click the drop down and select the first code: 01 A 000 00.** Make sure that you chose a pre-verifier if you are selecting this generic code.
- 15. If you are using multiple codes, Select *More* and another account field will appear.
- 16. Click Save.
- 17. This will bring you back to the Expense Reimbursement Request Maintenance Screen. Here you can verify that you have selected a pre-verifier if needed, attach receipts, or add more items.

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There are no records to display; check your filter settings.	Delete
	Clone
	Mass Add Detail

18. To attach receipts, select "Attachments" and a new window will appear. Click

19. For Type, select "Attachments", add a description that can be as simple as "receipts" and click browse to find your scanned receipt file. Click Save. Click Back.

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Expense Reir	mbursem	ent Request Attachments	<b>1</b>	Ū
Add Expense R	eimbursem	ant Request Attachment	Save	
* Type:	Attachments	Expense Reimbursement Request	<u>B</u> ack	
Entered Date:	03/27/2015			
Entered Time:	3:00 PM			
Entered By:	HEATHER C	AUNE		
* Description:	Receipts			
* Attached File:		Browse		
Asterisk (*) denotes	a required fie	10		

- 20. To add another expense, either select define or clone if the expense is similar (for example, multiple mileage expenses).
- 21. When you are finished entering expenses, select either Submit For Approval to submit it to the pre-verifier or your supervisor.

Or select Finish Later if you want to add more expenses before submitting for reimbursement.