# Guide to Enter Expense Reimbursements in Skyward –currently just used for MILEAGE REIMBURSEMENTS

### Log into Skyward Financial, then Employee Access, then click on the Expense Reimbursement Tab

Home     Employee     Time     Account     Budget       Home     Information     Off     Master     Management       Purcha       Employee     Access	asing E Reir	Expense mbursement Ope	Online en Enrollment					Favorites ▼	New Window 🖶 M	ly Print Queue
Jump to Other Dashboards		Favorites				0	ump to Other Systems			
Skyward User Employee		No favorites avail	ab				Employee Access	)		
Reset Dashboards Select	t Widgets	AP Payments	126380	118 32	Show Invoice(s)	0				
		03/14/2013	125540	153.00	Show Invoice(s)		My Print Queue			0
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🚔 Employee Access Home	1	04/19/2006	12234	32.00	Show Invoice(s)		No items available.			
My Requests	<b>¢</b>	12/20/2005	96473	49.41	Show Invoice(s)					
Requests Pre-Approval	<b>(</b>						My Time Off Status			0
Decempl Information	Ċ						Time Off Code	Remaining Ap	proved Waiting	Available

## **Click on Submit Request**

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Home         Employee         Time         Account         Budget         Purchasing         Expense         Online           Home         Off         Master         Management         Purchasing         Expense         Open Enrollment	
Expense Reimbursement	📄 📷 🚖 Favorites 🔻 🖺 New Window 🖏 My Print Que
- Submit Request 1 T	o Other Systems
	ployee Access 😭 😭

## Click on on Add

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ter settings.												-	Request
												- (	Add

## Enter in dates and a brief description of what the expense is for and click SAVE



## Click on ADD or MASS ADD DETAIL.

Expe	ense Reiml	ourseme	nt Request Maintenance				📹 靠 📮 ^
Expe	ense Reimbur	sement Info	ormation				Submit For Approval
	Reimbu	irsement For	LEY, DAVID J (TEA)		Edit Master		Save and Finish Later
	Ex	penses From	: 03/01/2015 To: 03/31/2015 31	Days	Notes		
1	Purpose for Rei	mbursement	Mileage-conference in March 2015		Attachments		
Reim	bursement pay	ment option	Paid via AP ACH. If AP ACH is not setup you wil	l receive a Paper Check.			
То	otal Reimbursem	nent Amount	\$0.00				
	Required	d Pre-verifier	·				
Expens	se Reimburse	ment Detail	Lines				
Views:	General 🔻	Filters: *Sk	yward Default 🔻			T 🛄	Add
# 🔺	Date	Туре	Description/Customer	Quantity	Amount Total Am	ount C P	Edit
There a	are no records i	to display; cl	heck your filter settings.				Delete
			Click on ADD or MA	SS ADD DETAI	L		Clone Mass Add Detail

## Click on REIMBURSEMENT TYPE link

Expense Reimbursement	Request Detail Mai	ntenance		💼 🕆 🖶 ?
Expense Reimbursement Inform Expenses From: 03/0 Total Reimbursement Amount:	ation 1/2015 To: 03/31/ \$0.00	2015 31 Days		
Add Expense Reimbursement De Line Number: * Date 103/0 * Reimbursement Types Categopur othe	etail Line 1 1/2015 Sunday	Receipt Attached	Direct Bill/Do not Reimburse	Save Back
* Quantity: * Amount: Total Amount: * Description/Customer:	0 \$0.00 \$0.00	Click on Reimbursement Type		

## Highlight the expense you wish to be reimbursed for and then click SELECT

<b>Reimbu</b> Views: Ger	rsement Expense Coo	<b>des</b> ⊨fault ▼					( T 🛄 💌	1 1 1 1 1	
Code 🔺	Description	User Defined Amount Label	UD Amt Type	Default Amount	Amt Edit	Max Amount	User Defined Quantity Label		Vi <u>e</u> w Back
Mileage	Mileage Reimbursement	Amount	Decimal 4 Places	\$0.5100	N	\$0.00	Quantity	^	
Parking	Parking Fee	Amount	Decimal 4 Places	\$0.0000	Y	\$0.00	Quantity		
9	et reimbursed for, e Parking	our are wishing to ither Mileage or Fee				[	Click SI	ELE	ст

Once you select the Reimbursement Type, it will fill in a message in the box- "This is to be used for Mileage Reimbursements." You will need to enter in the QUANTITY of miles that you are claiming for reimbursement. The form will automatically calculate the TOTAL AMOUNT.



You will need to know what account number the travel should be expensed to. If you are not sure, contact the administrator that approved the conference or expense.



You can then click on the Account Number that you wish to select and it will AUTO FILL

## Another way to select the account number is to just click on the ACCOUNT link

Ac	count	t D	istı	ribut	tion													1	1	<b>.</b> ?	
Av	ailable	Ac	cou	nts (/	Accou	nts	are disp	layed ba	ased on	Account	Cleara	ance a	ccess)	_						Save Account	
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10	E	4	401	342	1623	12	000			\$-218.00	0				<u> </u>	Code	)	Description			
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#### Select you account number.

#### Account Distribution

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Expense Reimbursement Request Detail Mainten	ance		in the second se
Expense Reimbursement Information			
Expenses From:         03/01/2015         To:         03/31/2015           Total Reimbursement Amount:         \$102.00         \$102.00         \$102.00	31 Days	Click on SAVE	
Add Expense Reimbursement Detail Line			Save
Line Number: 1	Receipt Attached	Direct Bill/Do n	ot Reimburse
* Date: 03/15/2015 Sunday	]		
* Reimbursement Type: Mileage Reimbursement		<ul> <li>Mileage</li> </ul>	
Category: Mileage Reimbursement			
This is to be used for Milesee Deimburg	comonte.		

If you have additional expenditures, you can click on ADD or I find it easier to click on CLONE, especially if I am using the same account number for my new expenditure.

Expense Reimb	ursement Re	quest Maintenance						i 🚺	Ō	?
Expense Reimburs	ement Informatio	n						Sub	mit For proval	
Reimbur	sement For: LEY, D	AVID J (TEA)			Edit Master			Sa	ve and	_
Exp	enses From: 03/01	/2015 To: 03/31/2015	31 Days	0	Notes			( I III	Later	- 1
Purpose for Rein	nbursement: Mileage	e-conference in March 2015			Attac hments					
Reimbursement payn	nent option: Paid vi	a AP ACH. If AP ACH is not setup you	will receive a Paper Ch	ieck.						- 1
Total Reimburseme	ent Amount:	\$102.00								- 1
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# 🔺 Date	Туре	Description/Customer	Quantity	Amount	Total Amount C	R	D		E	
▶ 1 03/15/2015	Mileage Reimburs	EXE Science Teacher Conference in Wisconsin Dells on 3-15-2015	200.0000	0.5100	102.00 G			^	Dele	ete
	[	Click on ADD or CLONE 1	to add anothe	r expenditi	ure				<u>C</u> lou Mass Det	Add ail

In the Example below, I clicked on the CLONE button and just changed the information that was needed: date, Quantity of miles and the description and maybe the account number if I was not using the same one that I previously did. Click SAVE when finished.

pense Reimbursement Request Detail Maintenance	
xpense Reimbursement Information	Click SAVE when finished
Expenses From: 03/01/2015 To: 03/31/2015 31 Days Total Reimbursement Amount: \$120.36	
one Expense Reimbursement Detail Line	Save
Line Number: 2 Receipt Attached	Direct Bill/Do not Reimburse
* Date: 03/25/2015 Wednesday	· · · · · · · · · · · · · · · · · · ·
* Reimbursement Type: Mileage Reimbursement	Mileage
Category: Mileage Reimbursement	
* Quantity: 36.0000 * Amount: \$0.5100	be changed from a cloned screen
Total Amount: \$18.36	
* Description/Customer: Science Teacher Meeting at NTC on 3-25-15	
Detail Line Accounts	American Develop
	Amount Percent
J E 809 342 110000 387 - GENERAL/DISTRIC/EMPLOYE/UNDIFFE/Peer Review/	18.36 100.00 More

SUBMIT FOR APPROVAL or SAVE AND FINISH LATER. If you are done and have no other mileage expenses to claim, you could click the SUBMIT FOR APPROVAL. If you know that you will have another mileage expense that you will need to enter, you could click on the SAVE AND FINISH LATER. Just to note, you can add notes and attachments to the Expense Reimbursement screen.

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Exper	nse Reimbu	ursement Req	uest Maintenance		•					<u>.</u>	2
Expen	nse Reimburse	ement Information						5		Submit Appro	For val
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Once you click SUMBIT FOR APPROVAL, you will see the screen shot below. The Expense Reimbursement works very similar to a Requisition. You will want to see a status of WFH, meaning waiting for a higher approval. You can click the down arrow and see any detail related to the Expense Reimbursement.



All Mileage Reimbursements will be paid directly to your bank account (as set up in Payroll) and no check will be issued. You will receive and email telling you that your payment will be made to the bank within 2-3 business days. If you have any questions, please contact Darlene or Tabitha at 715-693-2530, ext #6109 or 6107.