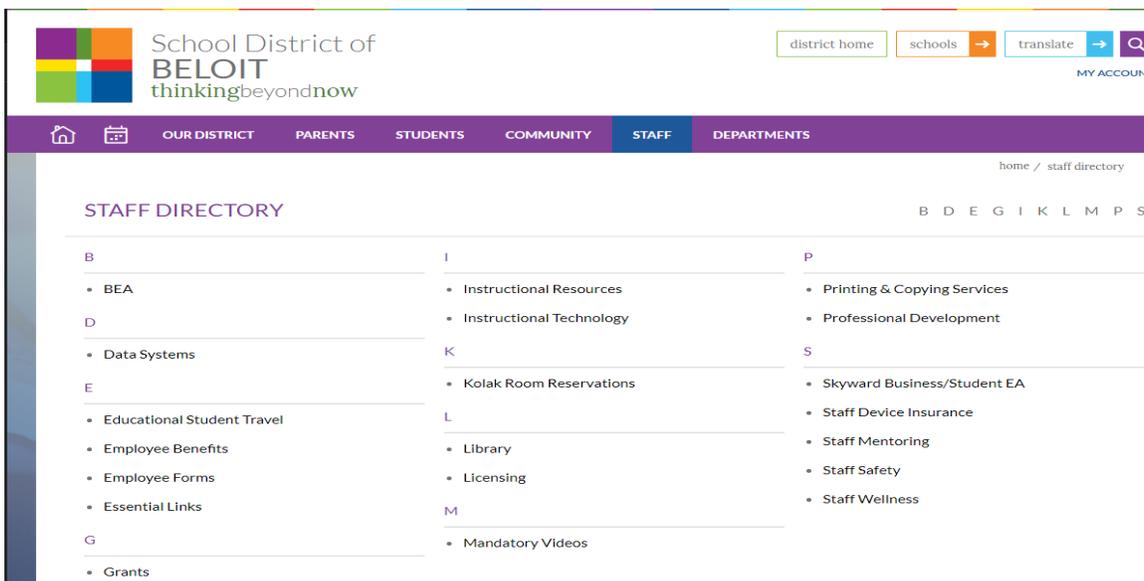


## Employee Expense Reimbursement Procedures

- In-District Travel
  - Submit monthly
  - Must attach a mileage log documenting each day's travel with origination and destination (please refer to district mileage chart for mileage between buildings)
- Out-Of District Travel
  - Must attach mileage verification from Google Maps or MapQuest (screenshot)
  - If traveling by air, flight itinerary must be attached
  - Meeting/Workshop/Conference agenda or registration must be attached to confirm dates, location and meal (if any) provided by the conference registration
  - Meals are only reimbursed if overnight stay is required **and** if meals are not provided by conference registration fee. Eligible meals do not require receipts and are reimbursed at the per diem rate for the specific city. Contact Ardis Lohff [alohff@sdb.k12.wi.us](mailto:alohff@sdb.k12.wi.us) for each city's meal rate.
  - When requesting reimbursement for multiple meals such as three lunches, use Quantity of 3 rather than three different entries.
- Reimbursement for items or services (such as taxi's or supplies) other than those mentioned above require receipts to be attached. The district does not reimburse sales tax. A copy of the tax exempt certificate can be provided by building secretary or Ardis Lohff.
- Denied entries must be corrected. Log back into Skyward, select Expense Reimbursement, select Submit Request, highlight the entry that needs correction, click on Notes button. Descriptions of any necessary corrections are documented. Make the necessary corrections and click on Submit for Approval.

### Directions for Entering an Expense Reimbursement in Skyward

1. Go to School District of Beloit home page. Click on Sign In. Enter network user name and password. Click Sign In. Click on Staff. Click on the link for Skyward Business/Student EA.



2. Log into Skyward.



3. On the right side, click on Employee Access.

4. Click on Expense Reimbursement.



5. Select Submit Request.

6. Select Add.  If a screen comes up indicating you are not set up as an ACH vendor, contact [alohff@sdb.k12.wi.us](mailto:alohff@sdb.k12.wi.us) and you will be set up.

7. Complete screen with appropriate information. For Purpose for Reimbursement, enter name of conference and location. For other types of reimbursement, enter brief description such as In District Mileage. Click Save.

### Expense Reimbursement Request Maintenance

#### Add Expense Reimbursement Request

Reimbursement For:

\* Expenses From:  \* To:

\* Purpose for Reimbursement:

Reimbursement payment option:

District Payment Reimbursement information:

Asterisk (\*) denotes a required field

8. Add Reimbursement Detail Lines by clicking Add on the middle right side.

### Expense Reimbursement Request Maintenance

#### Expense Reimbursement Information

Reimbursement For:

Expenses From:  To:  2 Days

Purpose for Reimbursement:

Reimbursement payment option:

Total Reimbursement Amount:

Required Pre-verifier:

#### Expense Reimbursement Detail Lines

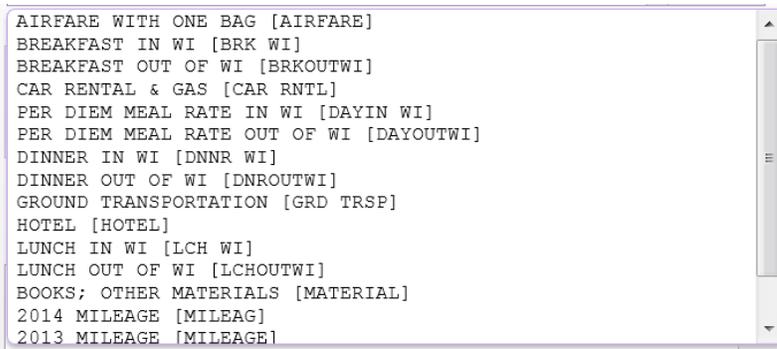
Views:  Filters:

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	C	R	D
There are no records to display; check your filter settings.									

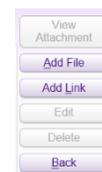
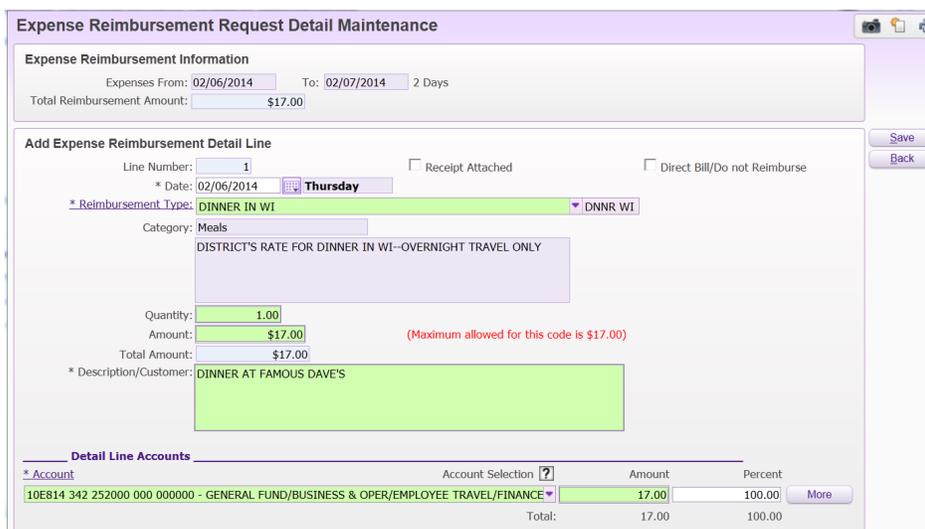
9. Enter or adjust the Date of the Expense. For Reimbursement Type, click on the down arrow for

options. \* Reimbursement Type:

10. Select Expense Type.



11. Complete the screen by adjusting the “Quantity” and entering a “Description”. If you are requesting three lunches, enter 3 as the Quantity rather than making three entries. Tab to the “Account” line and enter the account number to be charged. If a receipt is required, click “Receipt Attached”. Click Save. See Hints at the beginning of this procedure for required documentation.



12. To attach a receipt, click on Attachments. Click on Add File. At “Type” click on down arrow and select “Attachments (Expense Reimbursements

Attachments)”. Add “Description”. Click on Browse...  Select the document to be

attached. Click Save. In the next screen, click Back.

https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinbeloitwi/fattmview003.w?isPopup=true

### Expense Reimbursement Request Attachments

**Edit Expense Reimbursement Request Attachment**

\* Type: Attachments Expense Reimbursement Request

Entered Date: 02/11/2014

Entered Time: 11:31 AM

Entered By: ARDIS A LOHFF

\* Description: RECEIPT FOR KALAHARI

\* Attached File: sample receipt.pdf  
 Change the file that is used for this attachment.

Asterisk (\*) denotes a required field

Save Back

13. If you have more than one Expense Type for the same day/conference, click Add. Continue until all expenses have been entered. When adding another expense, at the Add screen you can choose Clone. Make the changes for the new expense; you won't need to reenter the account number. Then click Save.

**Expense Reimbursement Information**

Reimbursement For: LOHFF, ARDIS A

Expenses From: 02/06/2014 To: 02/07/2014 2 Days

Purpose for Reimbursement: EXPENSES TO ATTEND SKYWARD CONFERENCE AT KALAHARI--MEALS, MILEAGE, AND HOTEL

Reimbursement payment option: Reimbursement Payment made via AP ACH

Total Reimbursement Amount: \$229.12

Submit For Approval Save and Finish Later Edit Master Notes Attachments

**Expense Reimbursement Detail Lines**

Views: General Filters: \*Skyward Default

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	C	R	D
1	02/06/2014	DINNER IN WI	DINNER AT FAMOUS DAVE'S	1.0000	17.0000	17.00	M		
2	02/06/2014	HOTEL	HOTEL STAY AT KALAHARI	1.0000	99.0000	99.00	L		
3	02/06/2014	2014 MILEAGE	MILEAGE TO AND FROM WISCONSIN DELLS	202.0000	0.5600	113.12	G		

Add Edit Delete Clone Mass Add Detail

14. If you need to leave this process before finishing, click Save and Finish Later. If you have completed your expense reimbursement request, click Submit For Approval.

Submit For Approval Save and Finish Later

If you have any questions, please email/call Ardis Lohff at [alohff@sdb.k12.wi.us](mailto:alohff@sdb.k12.wi.us) or 361-4116.