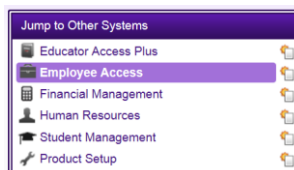


Entering Employee Expense Reimbursement for Out-of-District Travel

1. Go to School District of Beloit home page. Click on For Staff, Essential Links. Click on the link for Skyward Business (Skyport).



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



3. Click on Expense Reimbursement.



4. Select Submit Request.

5. Select Add.



6. Complete screen with appropriate information. Be sure to include the name of the conference and the location. Click Save.

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

Add

8. Enter or adjust the Date of the Expense. For Reimbursement Type, click on the down

arrow for options.

* Reimbursement Type:

9. Select Expense Type.

AIRFARE WITH ONE BAG [AIRFARE]
 BREAKFAST IN WI [BRK WI]
 BREAKFAST OUT OF WI [BRKOUTWI]
 CAR RENTAL & GAS [CAR RNTL]
 PER DIEM MEAL RATE IN WI [DAYIN WI]
 PER DIEM MEAL RATE OUT OF WI [DAYOUTWI]
 DINNER IN WI [DNNR WI]
 DINNER OUT OF WI [DNNROUTWI]
 GROUND TRANSPORTATION [GRD TRSP]
 HOTEL [HOTEL]
 LUNCH IN WI [LCH WI]
 LUNCH OUT OF WI [LCHOUTWI]
 BOOKS; OTHER MATERIALS [MATERIAL]
 2014 MILEAGE [MILEAG]
 2013 MILEAGE [MILEAGE]

- Complete the screen by adjusting the “Quantity” and entering a “Description”. Tab to the “Account” line and enter the account number to be charged. If a receipt is required, click “Receipt Attached”. Click Save.

Expense Reimbursement Request Detail Maintenance

Expense Reimbursement Information
 Expenses From: 02/06/2014 To: 02/07/2014 2 Days
 Total Reimbursement Amount: \$17.00

Add Expense Reimbursement Detail Line

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

* Date: 02/06/2014 Thursday

* Reimbursement Type: DINNER IN WI DNNR WI

Category: Meals

DISTRICT'S RATE FOR DINNER IN WI--OVERNIGHT TRAVEL ONLY

Quantity: 1.00
 Amount: \$17.00 (Maximum allowed for this code is \$17.00)
 Total Amount: \$17.00

* Description/Customer: DINNER AT FAMOUS DAVE'S

Detail Line Accounts

* Account	Account Selection	Amount	Percent
10E814 342 252000 000 000000 - GENERAL FUND/BUSINESS & OPER/EMPLOYEE TRAVEL/FINANCE	7	17.00	100.00
Total:		17.00	100.00

Buttons: Save, Back, Edit Master, Notes, Attachments, View Attachment, Add File, Add Link, Edit, Delete, Back

- 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.

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

12. If you have more than one Expense Type for the same day/conference, click Add.

Add

Continue until all expenses have been entered. See Hint #1.

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

Edit Master Notes Attachments Submit For Approval Save and Finish Later

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

13. 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 or 361-4116.

Hints:

1. When adding another expense, at the Add screen you can choose Clone.

Add

Edit

Delete

Clone

Mass Add Detail

Make the changes for the new expense; you won't need to reenter the account number.
Then click Save.