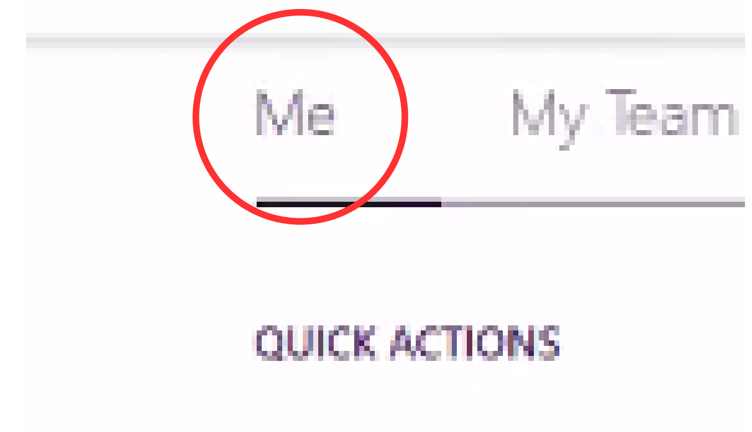
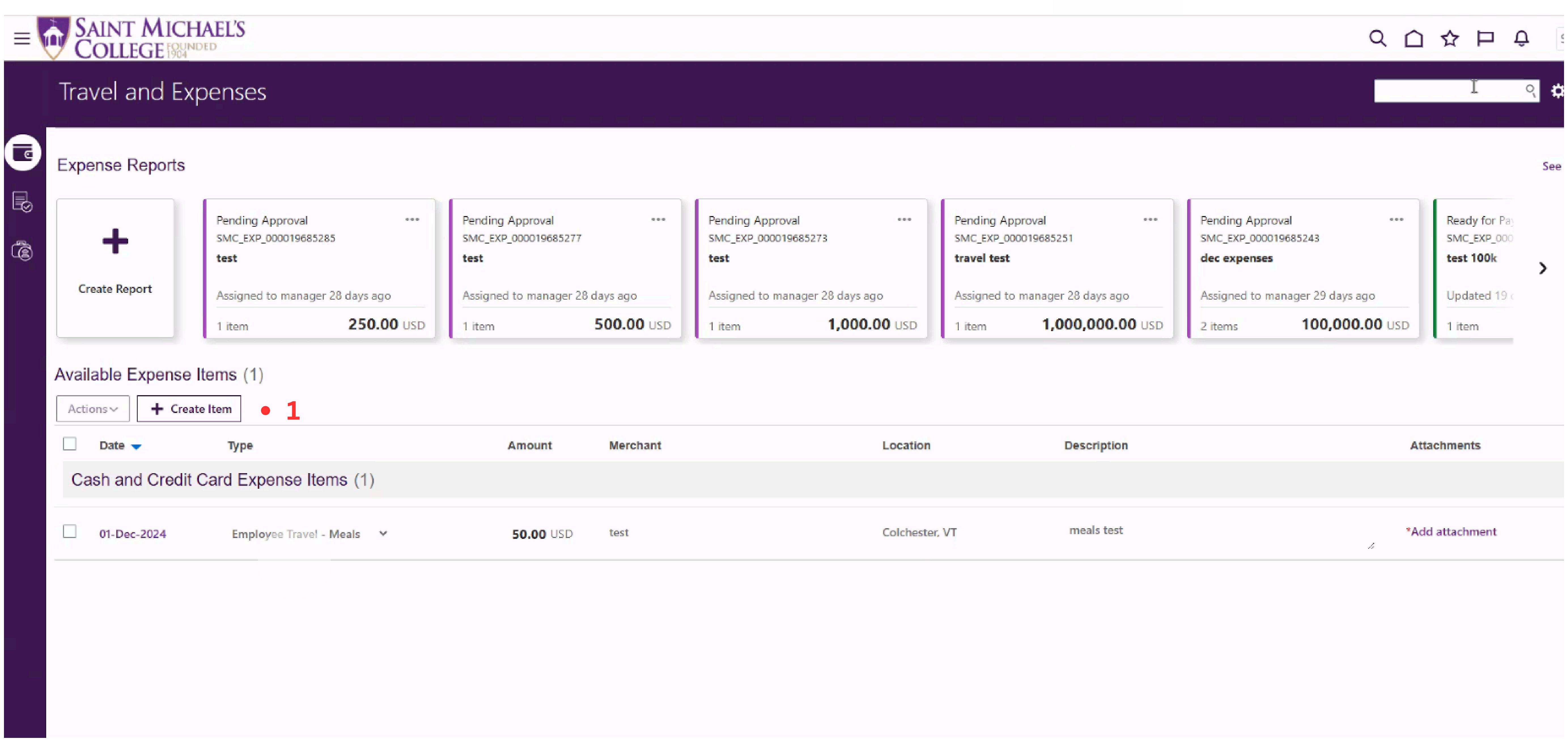
Submitting a Reimbursement

How to submit your reimbursement in Expenses

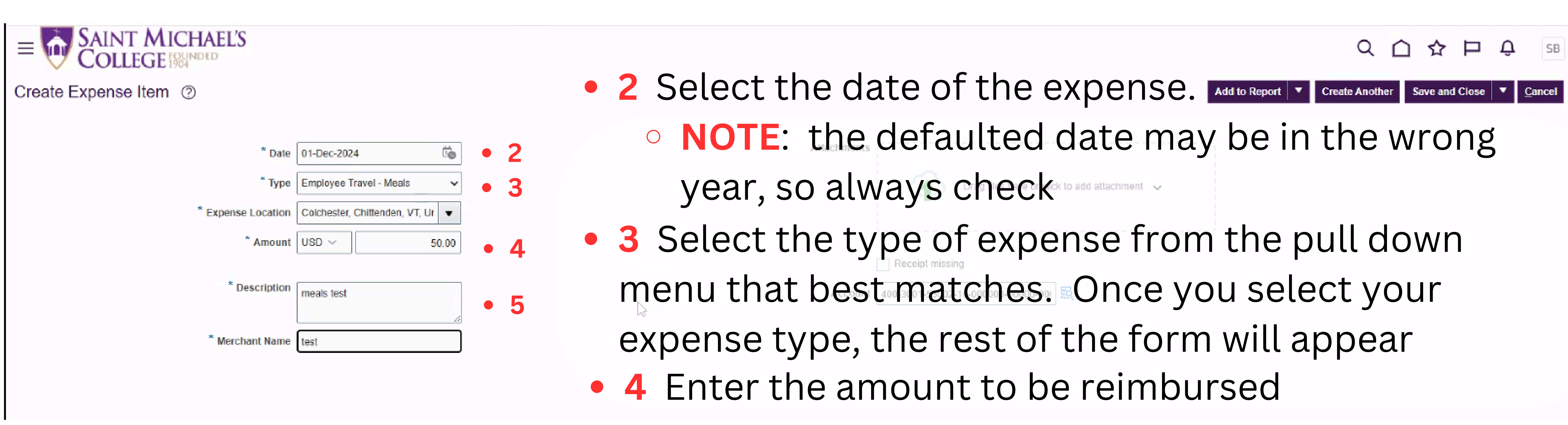
From the **Me** page find the **Expenses** icon and click into it. You may need to scroll down to find it.



Clicking on the **Expenses** icon will take you to the Expenses Workbench



- **1** To create a reimbursement click on **+ Create Item**



- **2** Select the date of the expense.
  - **NOTE**: the defaulted date may be in the wrong year, so always check
- **3** Select the type of expense from the pull down menu that best matches. Once you select your expense type, the rest of the form will appear
- **4** Enter the amount to be reimbursed
- **5** Enter a description of the expense and the reason for the expense

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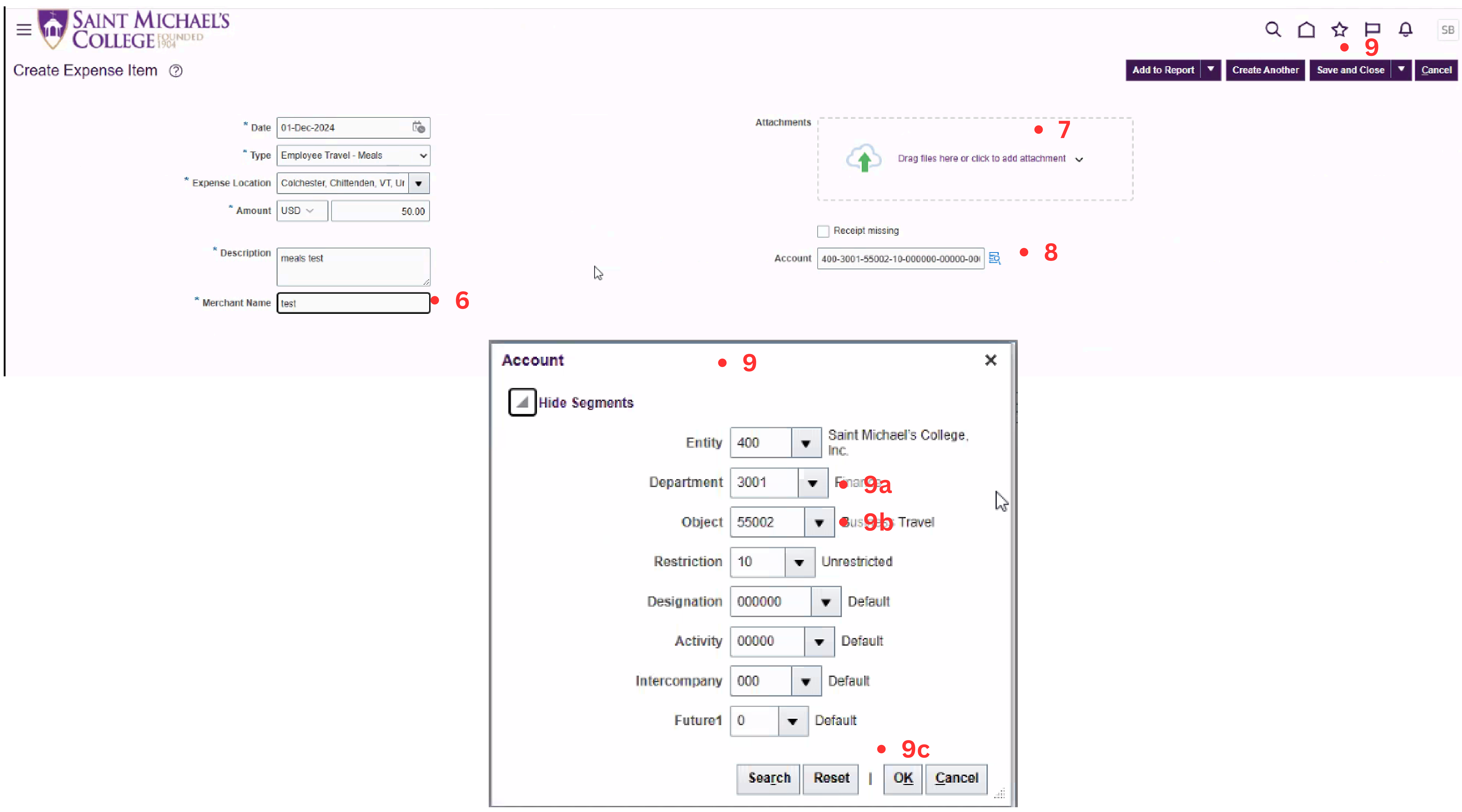

- **6** Enter the Merchant Name, match the name on the receipt
- **7** Add an invoice or receipt by either drag and dropping it into the square or clicking on the purple text. An invoice should include the date, name of the vendor and the amount charged to your card. Preferred file types are **.pdf or .jpeg**
- **8** View and change the Account (or EDORDA) by clicking on the blue icon. A pop up box with detailed information will appear (fig. 8)*
- **9** The **Account** pop up box breaks out each part of the EDORDA. Common items to edit are:
  - **9a** The Department, especially if you enter expenses for more than one department.
  - **9b** The Object can be edited to better reflect or narrow down the category of this expense
  - **9c** Click **OK** once your EDORDA is correct
- **10** Once you have verified that your information is correct click **Save and Close**

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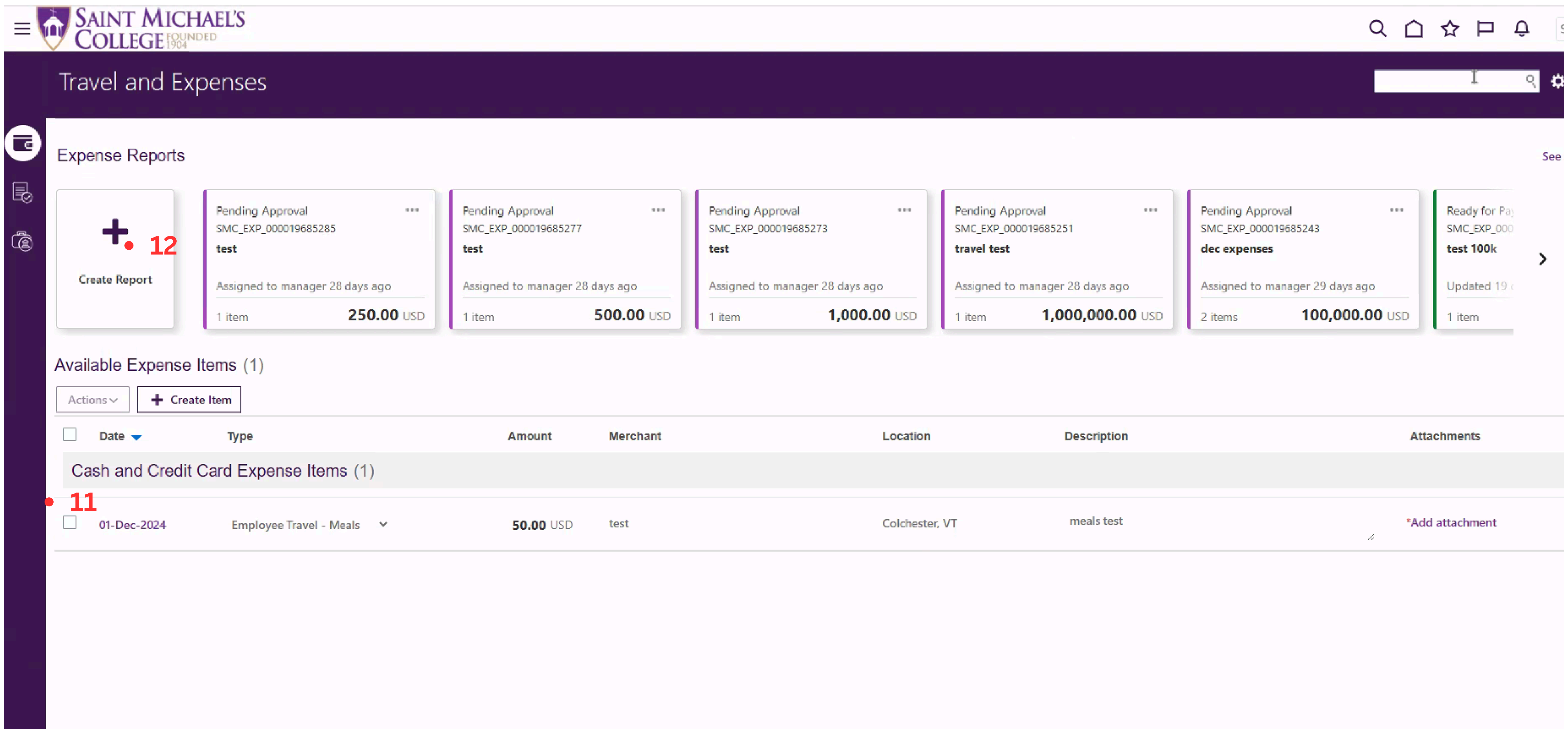
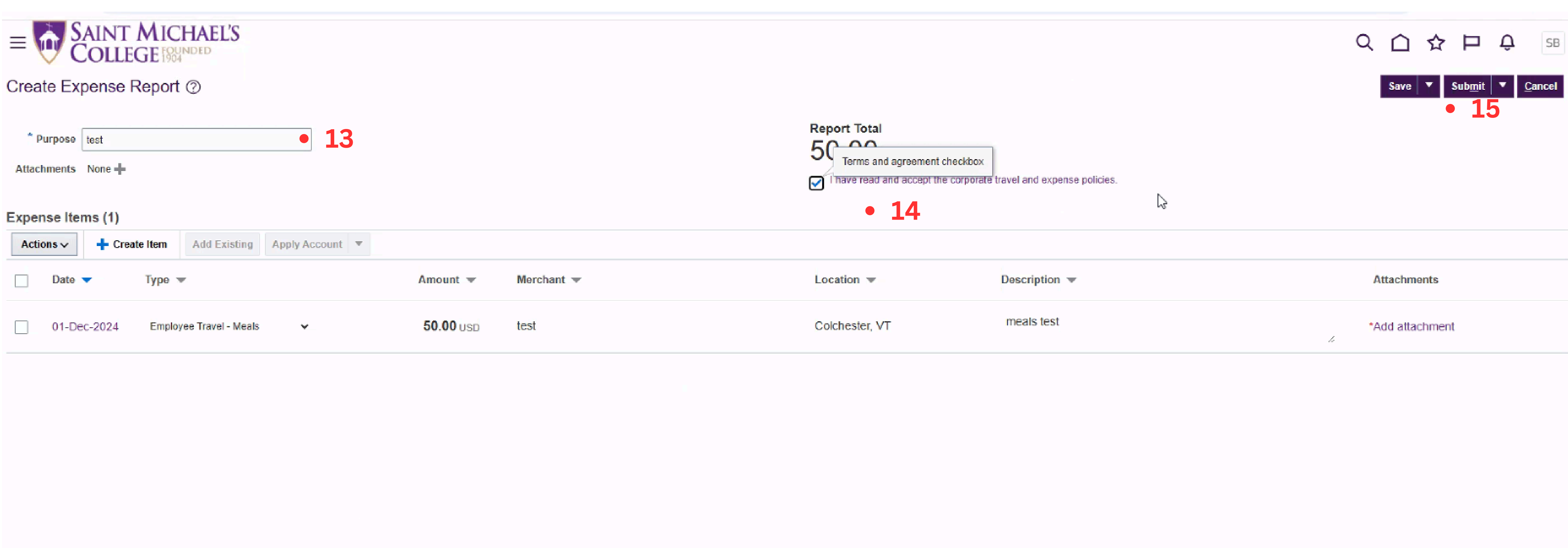


- **11** Check the box next to your expense to add it to an expense report
- **12** Click on the big **+** to create and submit your expense report



- **13** Use the Purpose field to call out that this is a Reimbursement by writing the word **Reimbursement** in this field.
- **14** Check **I have read and accept the corporate travel and expenses policies**
- **15** Click on **Submit**

If you have any questions or need any assistance, please contact Accounts Payable at: ap@gmhec.org