

Instructions for Staff Expense Reimbursement Form

1. Type your name & address information. (You may tab after each field).
2. Select a division from the drop down box.
3. Enter the expense account code(s) and amount(s).
4. In the date box, enter the date or pick a date from the calendar.
5. Type in the description and business purpose of the expense.
6. The form will automatically calculate the mileage.
7. Type in the amount of the expense(s) for lodging, meals, miscellaneous.
8. The total expense will be displayed at the bottom right hand side of the form.
9. Please make sure the bottom right hand total amount and the upper right hand side total amounts are the same.
10. You may now digitally sign your form (placing your cursor over the signature line—it will prompt you through the process). Once you complete your first digital signature, it will be saved for future use.
11. You may save the form on your personal drive or shared drive for future reference.
12. You may enter a title if applicable.
13. Forward the form (by e-mail) along with scanned copies of receipts, list of names, and other required documentation to your manager/division director for his/her approval.
14. Once your manager/division director digitally approves the form, he/she can either forward the saved form to Patti Schafer or send it back to the staff person receiving the reimbursement and the staff person can forward it to Patti Schafer via e-mail.
15. If you have any questions, please call Patti @ 6362.

Note: This form replaces any old or existing forms and should be used going forward.

If you have any questions about this form, please contact Patti Schafer @ 6362 or pschafer@mail.michbar.org.