


## Submitting Expense Reimbursements in Skyward

### Employee Access:

Go to <https://skyfinance.isd181.org/scripts/wsisa.dll/WService=wsFin/seplog01.w> OR go to [isd181.org](http://isd181.org), click Staff, Skyward Employee Access

Enter your employee access login information. If you do not know your employee access login info, click the Forgot your Login/Password? link.

Click the Expense Reimbursement tab, Submit Request.

Select the Program Notes icon , click the shaded triangle next to the Date Entered, so that you can open the Submitting Expense Reimbursement Online Tutorial attachment and follow those directions.

### Informational Notes:

When you go to Add an expense reimbursement, if you receive this error “You are not set up properly to receive AP Payments. Please contact your supervisor.”, please email the Accounts Payable/Receivable Secretary ([kristie.oliver@isd181.org](mailto:kristie.oliver@isd181.org)) to help resolve this issue.

If you do not see the correct person listed under Submit To: or receive an error that the batch is locked please email the Accountant ([tamela.langer@isd181.org](mailto:tamela.langer@isd181.org)) to help resolve this issue.

You do not have to submit the request right away. You can select Save and Finish Later rather than Submit for Approval. On the Submit Request screen, the request status will then say WIP and you can select the Edit button on the right hand side when you would like to access that request.

After a request has been submitted, you are still able to make changes by selecting Edit. No changes can be made once the final approver, Director of Business Services, has approved the reimbursement. If additional documentation is requested from business services, documents can be attached without editing the document. If the document is edited, it will need to be resubmitted for approval and go back through the approval process.

One request can have multiple line items. For example, if you are going to submit for interschool mileage and conference expenses, this can be done on one request, rather than submitting separate requests.

You will receive emails when your request has been approved and when payment will be made. If you are not receiving these emails, please email the Payroll Manager ([catherine.boser@isd181.org](mailto:catherine.boser@isd181.org)) to help resolve this issue.

If you have submitted your request and are wondering why it has not been reimbursed, you can review the status by going to the Submit Request screen, selecting the reimbursement, clicking the shaded triangle next to the Reimbursement Number and clicking the shaded triangle next to Approval History.

If you would like to see when a reimbursement was paid click Employee Information tab, Accounts Payable Payments.

Reimbursement requests should be submitted within 60 days of the date of the expense.

Slide 1 - Slide 1

The screenshot shows the Skyward School District web application interface. The top navigation bar includes tabs for Home, Employee Information, Time Off, True Time, FastTrack Open Positions, Work Requests, Account Master, Budget Management, Purchasing, Inventory Requisitions, Employee Review, Expense Reimbursement, and Online Open Enrollment. The 'Expense Reimbursement' tab is active, and a sub-menu is open showing 'Submit Request', 'Approve', and 'Activity'. A yellow callout box is overlaid on the 'Submit Request' menu item, containing the following text:

**Submit Request**

Navigate to **Employee Access, Expense Reimbursement, Submit Request.**

**Who, What, When, Why?**  
Submit Request allows users to submit expenses for approval and be reimbursed via ACH or A/P check.

Submit Request would be used when expenses have been incurred that are eligible for reimbursement.

The interface also features a 'Recent Programs' sidebar on the right with items like 'Employee Access Home', 'Product Setup Home', 'Web Human Resources', 'Secured User', 'Financial Management Home', 'Configuration', and 'Human Resources Home'. The footer contains copyright information for Skyward, Inc. (© 2013), a reference to 'C.SUG\Indiana 2012 User Group - Finance', and the browser information 'Windows XP / Internet Explorer 8'.

Slide 2 - Slide 2

Submit Request - 05.12.10.00.00 - Windows Internet Explorer

Skyward School District

Angela Avilezscr Account Preferences Exit ?

Home Employee Information Time Off True Time FastTrack Work Account Budget Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enrollment

Submit Request ☆ The Submit Request browse displays.

Views: General Filters: \*Skyward Default

Reimbursement Number	Req Sts	Date Entered	Expenses From	Expenses To	Reimburs Amount	Direct Bill Amount	Total Amount	Purpose
There are no records to display; check your filter settings.								

Click Add.

10 0 records displayed

Reimbursement Number:

Slide 3 - Slide 3

The screenshot shows a web browser window titled "Submit Request - 05.12.10.00.00 - Windows Internet Explorer" displaying the "Expense Reimbursement Request Maintenance" form. The form is for user "Avilezscr, Angela A" and includes the following fields and callouts:

- Callout 1:** "1. The Expense Reimbursement Request Maintenance screen displays." points to the top of the form.
- Callout 2:** "2. Enter the Expenses From and To date range." points to the "Expenses From" and "Expenses To" date fields, both containing "03/11/2013".
- Callout 3:** "3. Enter a Purpose for Reimbursement description." points to the "Purpose for Reimbursement" text area, which contains the word "Conference".
- Callout 4:** "4. Click Save to continue or Back to cancel." points to the "Save" and "Back" buttons on the right side of the form.

Other form details include: "Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check." and "District Payment Reimbursement information: carol@somewhere.com". A note at the bottom states "Asterisk (\*) denotes a required field".

Slide 4 - Slide 4

The screenshot shows the Skyward web application interface for 'Expense Reimbursement Request Maintenance'. The browser window title is 'Submit Request - 05.12.10.00.00 - Windows Internet Explorer'. The application header includes the Skyward logo and the text 'Skyward School District'. A navigation menu at the top lists various modules: Home, Employee, Time, True, FastTrack, Work, Account, Budget, Purchasing, Inventory, Employee, Expense, and Online. The user is logged in as 'Angela Avilezscr' with options for 'Account', 'Preferences', and 'Exit'. The main content area is titled 'Expense Reimbursement Request Maintenance' and contains the following fields and links:

- Expense Reimbursement Information**
- Reimbursement For: Avilezscr, Angela A
- Expenses From: 03/11/2013 To: 03/11/2013 1 Day
- Purpose for Reimbursement: Conference
- Links: [Edit Master](#), [Notes](#), [\\* Attachments](#)
- Buttons: [Submit For Approval](#), [Save and Finish Later](#)

A yellow callout box provides the following explanations:

- Expense Reimbursement Information**
- The **Edit Master** link allows you to return to the previous screen and modify the request.
- The **Notes** link allows you to enter a note regarding the request.
- The **Attachments** link allows you to attach receipts or other pertinent documentation to the request.
- The **Submit for Approval** button is inactivated until the detail is completed.
- The **Save and Finish Later** button is active and allows you to save and return to finish the request later.

Below the callout box, a table header is visible with columns: #, Date, Type, Total Amount, C, R, D. The table content is empty, with the text 'There are no records to display' below it. On the right side, there are additional buttons: [Add](#), [Edit](#), [Delete](#), [Clone](#), and [Mass Add Detail](#).

Slide 5 - Slide 5

**Expense Reimbursement Request Maintenance**

**Expense Reimbursement Information**

Reimbursement For: Avilezscr, Angela A

Expenses From: 03/11/2013 To: 03/11/2013 1 Day

Purpose for Reimbursement: Conference

Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check.

Total Reimbursement Amount: \$0.00

**Expense Reimbursement Detail Lines**

Views: General Filters: \*Skyward Default

#	Date	Type	Description/Customer	Quantity
<i>There are no records to display; check your filter settings.</i>				

Click Add to create the Detail Line(s) for this reimbursement request.

Slide 6 - Slide 6

**Expense Reimbursement Request Detail Maintenance**

The Expense Reimbursement Information carries forward from the previous screen.

**Expense Reimbursement Information**

Expenses From: 03/11/2013 To: 03/11/2013 1 Day  
Total Reimbursement Amount: \$30.00

**Add Expense Reimbursement Detail Line**

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

\* Date: 03/11/2013 Monday

\* Reimbursement Type: Meals PM

Category: Meals

Quantity: 1  
Amount: \$30.00 (Maximum)  
Total Amount: \$30.00

\* Description/Customer: Required to stay for dinner - attended evening

**Detail Line Accounts**

\* Account: 0100 A 8000000 0000 000 000 - GENERAL FUND/cash/CASH/

Asterisk (\*) denotes a required field

Enter the **Detail Line** information for the open fields.

- Date** - Enter the date of the expense.
- Receipt Attached** - Check if a receipt will be attached.
- Direct Bill/Do Not Reimburse** - Check if the entry is documentation for an expense that will be billed to the district, and should not be reimbursed.
- Reimbursement Type** - Use the drop-down to select the reimbursement type code. This code will determine the Quantity and Amount fields.
- Quantity and Amount** - These fields will be determined by the reimbursement type selected above.
- Description/Customer** - This is a free form field used to enter any necessary details for the expense.

Slide 7 - Slide 7

**Expense Reimbursement Information**

Expenses From: 03/11/2013 To: 03/11/2013 1 Day  
Total Reimbursement Amount: \$30.00

**Add Expense Reimbursement Detail Line**

Line Number: 1  Receipt Attached  
\* Date: 03/11/2013 Monday  
\* Reimbursement Type: Meals PM  
Category: Meals

Quantity: 1  
Amount: \$30.00  
Total Amount: \$30.00  
\* Description/Customer: Required to stay for d

**1. Detail Line Accounts**

There are two ways to enter the account(s):

- a) Click into the field and begin typing the account. The EEL will display the account(s) from which to choose.
- b) Click on the Account link. This opens a list of all accounts from which to choose.

**2. Click Save** when done entering the Detail Line. Clicking Back will close without saving.

**Detail Line Accounts**

* Account	Account Selection ?	Amount	Percent	More
0100 A 8000000 0000 000 000 - GENERAL FUND/cash/CASH/		30.00	100.00	
Total:		30.00	100.00	

Asterisk (\*) denotes a required field



Slide 8 - Slide 8

**Expense Reimbursement Request Maintenance**

Expense Reimbursement Information

Reimbursement For: Avilezscr, Angela A

Expenses From: 03/11/2013 To: 03/11/2013 1 Day

Purpose for Reimbursement: Conference

Reimbursement payment option: Paid via AP ACH. If AP ACH is not setup you will receive a Paper Check.

Total Reimbursement Amount: \$30.00

**Expense Reimbursement Detail Lines**

Views: General Filters: \*Skyward Default

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	C	R	D
▶ 1	03/11/2013	Meals PM	Required to stay for dinner - attended evening conference session	1.0000	30.0000	30.00	M		

1. The detail line displays in the browse. Use the expand/collapse options to view the details of the record.

2. Detail line records can be edited, deleted, or cloned.

3. Mass Add Detail can be used to add multiple detail lines at the same time.

4. Click Submit For Approval when finished.

Slide 9 - Slide 9

Submit Request - 05.12.10.00.00 - Windows Internet Explorer

Angela Avilezscr [We value your feedback](#)

Home Employee Information Time Off True Time FastTrack Open Positions Work Requests Account Master Budget Management Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enroll

Submit Request

Views: **General** Filters: **\*Skyward Default**

Reimbursement Number	Req Sts	Date Entered	Expenses From	Expenses To	Reimburs Amount
0000000002	APP	03/11/2013	03/11/2013	03/11/2013	30.00

The reimbursement request displays in the browse and is Awaiting Approval.

An unapproved request can be printed, edited, deleted, or cloned.

Use the Notes and Attach buttons to add a note or attachment.

A request with a note or attachment will be flagged with an asterisk on the respective button.

This concludes the tutorial.

Print  
Submit Request  
Add  
Edit  
Delete  
Notes  
\* Attach  
Clone

10 1 records displayed Reimbursement Number:

Local intranet 100%