**What are the options for submitting a reimbursement?**

For flat-rate reimbursement, the volunteer can sign the mass approval form provided by the LC or enter the request in the portal. All itemized reimbursement requests must be entered by the volunteer into the portal. Requests may not be submitted in any other way – paper, spreadsheets, or information provided to leaders will not be accepted, approved, or paid.

**Why do I need to enter a separate request for each site?**

Tax-Aide depends on grants for material support such as software and laptops, as well as money for expenses such as meetings and reimbursement. These grants require that there is accountability for all expenses down to the site level. In addition, internal processes need to be able to identify sites that are not cost-effective. Both of these requirements are met when the expenses for a site are associated with that site, including mileage reimbursement.

**What if I want to put everything under one site or position?**

 It is critical that the new reimbursement process is followed exactly by the volunteers and the leaders that are approving the requests. Leaders must reject requests that don’t conform to these requirements. If not, a site’s expenses may be over- or under-reported. For leaders, the expenses must be associated with the position. For instance, training expenses are associated with the instructor position, but mileage for counseling must be associated with the counselor or LC position.

**How can volunteers identify the correct role and site for their reimbursement request?**

Most of our volunteers have only one program assignment (the combination of site and role) and therefore only one choice for reimbursement. For those that hold more than one role or volunteer at more than one site, the volunteer must identify the assignment ID for each site/role combination. To do this, the volunteer should find their contact information and look at the section called Volunteer Assignments. Each assignment is a combination of the site and the role at that site. To identify the site, look at the Sxxxxxxx portion of the position, which is the site ID, and the role (counselor, client facilitator, etc). The Volunteer Assignment ID (the one that starts with AS) to the right is the number used when requesting reimbursement. It may be helpful if the LC provides the site ID to the volunteers to help them identify each site. If the naming conventions were used for the TaxSlayer user ID the last 4 digits of the site ID are the first 4 digits of the user ID.



**How should volunteers with non-leader roles (counselor, client facilitator, support facilitator) enter itemized expenses?**

If the person volunteers regularly at one site only, all training (T) expenses and counseling mileage (I) expenses should be entered for that site. If the person substituted at another site for a day or two but is not a regular volunteer at the site, these mileage expenses may be entered under the site where the person regularly volunteers. No adjustments need to be made.

 If the person volunteers regularly at more than one site, all training (T) expenses should be entered for the regular or primary site. If the person volunteers equally at more than one site, pick one. The counseling mileage (i) expenses must be entered for each site separately. Mileage listed for a different regular site must be rejected by the supervisor.

**How should volunteers with leader roles (LC, DC, etc.) enter itemized expenses?**

Volunteers with a leader role and a non-leader role (LC and counselor) are considered to be acting in their leader role at the site. Therefore, all mileage for the site at which the volunteer is the LC should be entered as a coordinating (B) expense. If the volunteer also acts as a counselor at a separate site, those expenses are counseling(I) expenses. The expense is tied to the primary responsibility of the volunteer at the site.

Purchases made for more than one site (usually the DC purchasing paper for the district) should be entered by the DC at the district level.

**How should volunteers who hold multiple leader roles enter expenses?**

Expenses should be reported for the role that the expenses are associated with. For instance, if a volunteer is a DC and an LC, travel to the site, as well as expenses for that site, should be expensed as the LC position. Travel to meetings of DCs, as well as other expenses at the district level, should be expensed as the DC position. Instructors that also hold another leader position such as LC should separate trainer expenses from LC expenses.

Volunteer leaders that hold the same role at more than one site (usually an LC at more than one site) who have travel expenses other than coordinating (B) should choose one site for the expense. An example would be travel to a district meeting for all LCs.

**How are approvals for reimbursement requests handled when a volunteer has more than one request (multiple sites or roles)?**

Each request is sent to the direct supervisor for that role. For instance, counselor requests will go to the LC for that site, LC requests will go to the DC for that district, etc. The approval process is based on the position of the supervisor, not the person who holds that position, so it is possible for a volunteer to receive an approval request email for themselves. While the volunteer may receive an email about approving their own request, they can’t do so. The request must be approved by the next-highest supervisor, who will receive notification when the request is escalated after 5 days. In these cases, the volunteer can forward the email to the next-higher supervisor with an explanation and a request to approve without waiting for the escalation.

Example 1 – Volunteer is a counselor and LC at site 1 and the DC. Volunteer will not submit expenses as counselor but as LC. Notice is sent to the volunteer as DC, but it can’t be approved by the volunteer. After 5 days, the request is escalated to the SC, who can approve.

Example 2 – Volunteer is a counselor and LC at site 1, a counselor at site 2, and the DC. The request for site 1, which is entered as the LC role, is sent to the volunteer as the DC. The volunteer can’t approve the request, so it escalated to the SC. The request for the counselor role at site 2 gets sent to the LC for that site. If the LC fails to address the request it gets escalated to the DC, who is the volunteer. The request can’t be self-approved, so it gets escalated to the SC for approval.