SUBMIT FLAT RATE REIMBURSEMENT ⓥⓡⓔ

Overview:

Volunteer Leaders may elect to receive a $50 flat-rate expense reimbursement. If electing Flat Rate, this is the ONLY reimbursement that they will be allowed to take for the tax season.

Volunteers may elect to receive a $35 flat-rate expense reimbursement. If electing Flat Rate, this is the ONLY reimbursement that they will be allowed to take for the tax season.

Please consult the Policy and Procedures Manual for assistance is determining what expenses can be taken and if Flat Rate is the best choice for the volunteer

Submit a Flat Rate Expense

1. Go to **http://volunteers.aarp.org**, enter your e-mail address and password, and click on **LOGIN.**

2. From the Portal homepage, click on the *Reimbursement* tab.

3. Click **New Reimbursement.**.

4. Type your name in the Assignment box and click "**Go!**"

5. Click the Assignment ID that corresponds to the Position for which you are submitting the reimbursement request. Locate the assignment that is the HIGHEST Ranked assignment you hold and click on the **Assignment ID** for that position (ASXXXXXXXX).

Assignment ID	Volunteer	Position	Volunteer ID	Start Date
AS00359523	Claire Duffy	TA-R06-MN1-D03 District Coordinator	100059883	February 29, 2016
AS00359660	Claire Duffy	TA-R06-MN1-D03-S50051620 Counselor	100059883	February 1, 2010

6. Scroll down to the *Add Basic Information* section.

7. Choose **Flat Rate** from the *Reimbursement Type* drop-down menu.

⚠️ If you wish to take Reimbursement for Itemized Expenses, **do not proceed**. **See Tip Sheet - Submit Itemized Reimbursement**

Add Basic Information		
⑦ Reimbursement Type ⓘ Flat Rate ▼	Funding Code	🔍
Expense Pre-Approval ⓘ	Description ⓘ	

Note: Dependent upon your title, when selecting **Flat Rate** a Line Item for either $35 or $50 will automatically be generated.

Line Items

Action	Expense Date	Program Code	Expense Type	Description	Mileage Rate	Miles	Mileage Amount	Amount
✏️	03/22/2016	Tax Aide	Leadership Flat Rate(C)				0.00	50.00

8. Click on the Lookup Icon next to the **Funding Code** drop-down menu.

Add Basic Information		
Reimbursement Type ⓘ Flat Rate ▼	Funding Code	🔍
Expense Pre-Approval ⓘ	Description ⓘ	

9. In the search box that appears, type in a word from the role that is associated with the position chosen in Step 5.

10. From the list returned, choose the Funding code that lists the appropriate Role and ends in '– Federal Grants.' **Do not** choose anything with **Donated Funds** in the name, unless you are sure the expenses come from donated fund contributions.

Select a Funding Code

Coordinator [Search] **⑨**

Name
Tax-Aide - Administration Coordinator - Federal Grants
Tax-Aide - Communications Coordinator - Federal Grants
Tax-Aide - District Coordinator - Federal Grants **⑩**
Tax-Aide - Donated Funds Administration Coordinator - Federal Grants
Tax-Aide - Donated Funds Communications Coordinator - Federal Grants

11. Click "**Save**

Edit Reimbursement **⑪** [Save] Submit for Approval

▼ **Assignment Information**

Volunteer   Claire Duffy
Volunteer ID   100059883

12. Review the Reimbursement record for accuracy.

13. Check the box to verify you agree with the verification statement.

14. Click **Submit for Approval**."

15. Record is now locked. If changes are needed, click **Recall**, make edits, and click **Submit for Approval**.

    Note: The reimbursement request status will reflect a **Submitted** status upon being sent for approval. Reimbursements can only be recalled prior to being approved. Review **Approval History** section to determine status of Reimbursement.

Related Tip Sheets

- Submit Itemized Reimbursement

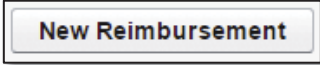# 10 - Submit an Itemized Reimbursement

Overview

Tax-Aide Volunteer Leaders may elect to receive **itemized** reimbursements by submitting an itemized list of their incurred expenses. Volunteers who work at more than one Tax-Aide site should submit an itemized reimbursement for each position.

Please consult the **Policy and Procedures Manual** for assistance in determining what expenses can be reimbursed. For instruction on how to submit a flat rate reimbursement, see **Reimbursements: Submit a Flat Rate Reimbursement.**

Topics:
- How to Request an Itemized Reimbursement
- Line Item Icons
  - Clone
  - Edit
  - Delete
  - Save
  - Delete
  - Add a Line Item

How to Request an Itemized Reimbursement

1. Click the **Reimbursements** tab.
2. Click **New Reimbursement**.

   New Reimbursement

3. Click on the **Assignment ID** that corresponds to the position for which you are submitting the reimbursement request.

Select Assignment			
Assignment ID	**Volunteer**	**Position**	**Volunteer ID**
AS00039087	Terrance Lee Atkins	TA-R09-OR1-D30-S63053202 Counselor	040503906
AS00039088	Terrance Lee Atkins	TA-R09-OR1-D30-S63053202 Local Coordinator	040503906

4. In the **Add Basic Information** section, select **Itemized** from the **Reimbursement Type** drop-down menu.

   Funding Code [   ]

5. Click on the Lookup Icon next to the **Funding Code** drop-down menu.

6. In the search box that appears, you will need to type the role that is associated with the position

   Select a Funding Code

   [   ] Search   Clear Funding Code

   Name   **Project/Grant**

for which you are submitting a reimbursement request, and click the **Search** button.
7. From the list returned, click the applicable funding code.

   Note: You may view the full funding code name in the **Add Basic Information** section by hovering your cursor over the populated **Funding Code** box.

8. Scroll down to the **Line Items** section and click the plus sign to add a line item.
9. Enter the expense information.
10. To add line items, repeat steps 7 and 8 or click the clone icon and edit the cloned line item. For instructions on how to use the clone feature, refer to the **Line Item Icons** section below.

    Note: The **Reimbursement Amount** in the **Reimbursement Summary** section will update as additional line items are saved to the reimbursement request.

Line Items									
+									
Action	Expense Date	Program Code	Expense Type	Description	Mileage Rate	Miles	Mileage Amt.	Amount	Funding Code
💾 ⊘	9/19/2016	-- Select Program Code -- ▾	-- Select Expense Type -- ▾		- ▾				Tax-Aide - Local Coordinat 🔍

11. In the **Add Receipts or Attachments** Section, click **Choose File** to find the receipt on a file on your computer. Repeat this step until all receipts have been attached. If additional attachment lines are needed, click the plus sign to add lines.
12. Review the reimbursement for accuracy.
13. If you would like to complete your expenses at a later date, click the **Save** button at the bottom of your reimbursement record.
14. If you would like to submit your reimbursement now, check the box in the **Verify and Submit Reimbursement** section if you agree with the verification statement and click **Submit for**

Verify and Submit Reimbursement

☑ By checking this box, I confirm that the amount claimed represents necessary expenses incurred while e
I have worked a minimum of 40 hours (excluding training and travel time) and receipts and approvals are in
taking this reimbursement, I do not qualify for a flat rate reimbursement for this or any other Tax-Aide positio

Save | Submit for Approval | Return to Reimbursement List

Approval.
15. The Reimbursement record is now locked. If changes are needed, click **Recall**, make edits, and click **Submit for Approval**.
16. To manage your expenses, click Return to **Reimbursement List** button.

Note: The reimbursement request status will reflect a **Submitted** status upon being sent for approval. Reimbursements can only be recalled prior to being approved. You may review the **Approval History** section-located on the reimbursement record- to determine status of Reimbursement.

Line Item Icons

Add a Line Item

The **Add a Line Item** icon creates a new line item where you should enter your expense information.

Save

The **Save** icon saves the line item that you are editing.

Delete

The **Delete** icon deletes the line item to the right of the icon. The delete icon appears in two different forms depending on if the line item that you would like to delete has been saved or is being edited.

1. The trash can icon appears next to saved line items.
2. The "no" icon appears next to line items that are being edited.

Edit

The **Edit** icon transforms the line item into an editable version so that you may update the information that appears on that line item. This icon appears next to saved line items.

Clone

The **Clone** icon allows you to clone the line item by creating an identical line item. This feature is helpful when you have multiple line items that have the same information except for the date the expense was incurred. Instead of re-entering the same information for multiple line items you could clone the original line item, edit the date, save the line, and repeat these steps until all line items have been added. This icon appears next to saved line items.

Duplicate Line Item

The **Duplicate Line Item** icon appears next to duplicate line items within the same – or a previous - reimbursement request. Hovering over the icon will indicate whether the duplicate line item is found within the current reimbursement or another request. If the duplicate is found within another request, a hyperlink will be included in the hover-over text that will take volunteers to the other reimbursement request.

If a volunteer attempts to submit a reimbursement with a duplicate line item, (s)he will receive a warning window indicating that a duplicate line item exists. The volunteer may choose to either submit the request, which will be reviewed by their supervisor, or to cancel the request and resolve the duplicate line item.