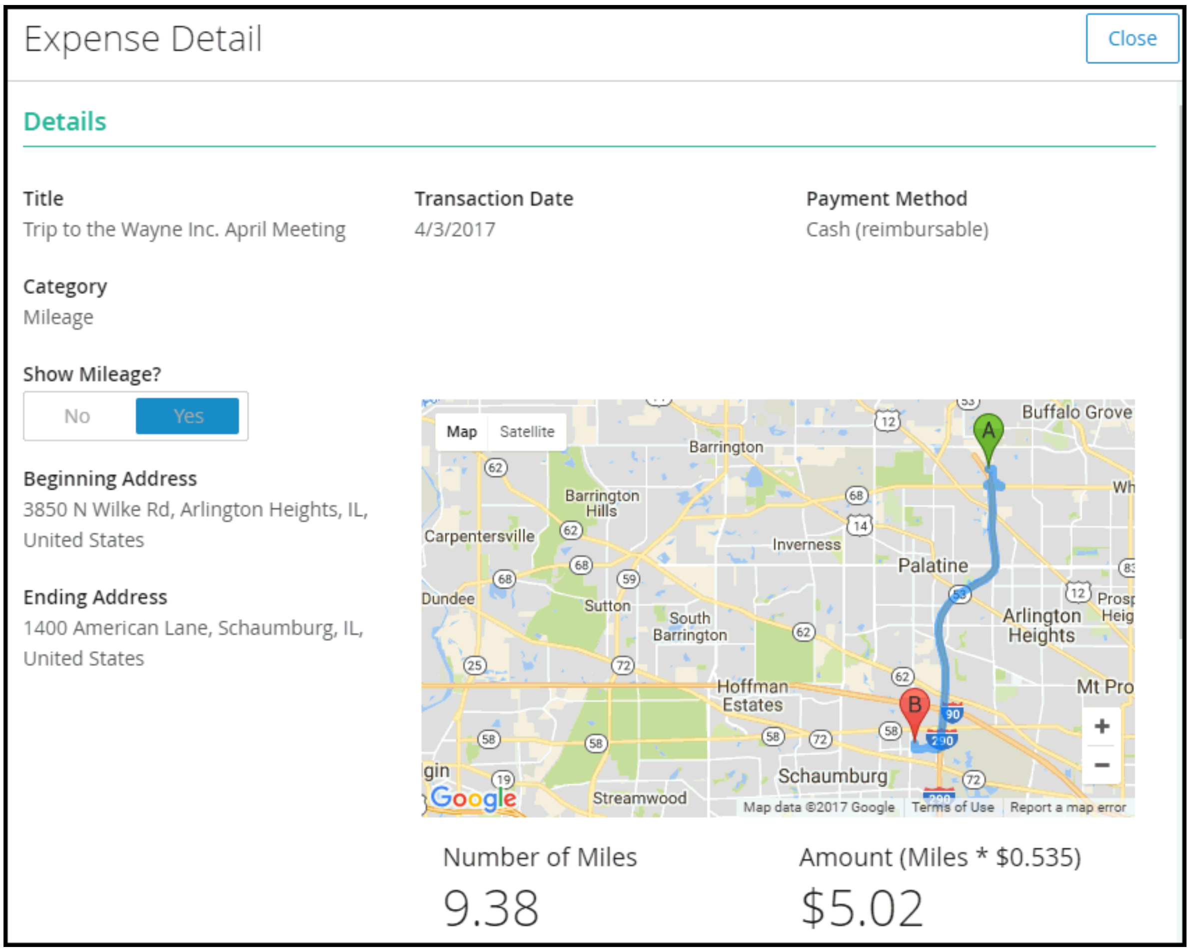
PROCESS for SUBMITTING REIMBURSEMENTS with PAYLOCITY

1. Select **+ Create Expense** after populating all required expense report fields.
2. Enter a **Title**.
3. Enter or select the date the expense occurred in the **Transaction Date** field.
4. Select the **Payment Method** in the dropdown menu. If there is only one payment method set up, the field defaults to that one payment method.
    - Use the Personal Payment Method option, **DO NOT USE (non-reimbursable) option.**
5. Select the appropriate **Category** in the dropdown menu.
6. Enter a **Amount** for the expense, if applicable.
    - Categories such as mileage can be per item, and require the number of miles.
    - If a user submits a mileage category expense where mileage calculates via the calculate mileage feature, the approver sees the Google Map, **Beginning** and **Ending Address** fields, **Number of Miles** and **Amount** section associated with the expense.



7. Add any additional notes to the **Notes** field, if necessary.
8. Adjust the **Cost Centers,** if the expense relates to something outside of the assigned cost centers. Depending on the expense policy assigned to, this may or may not be editable.

9. Edit the **Job** field, if necessary. This only applies when the assigned expense policy has jobs enabled, and at least one cost center is editable.
10. Select **Yes** in the **Itemize?** field if there is a need to [enter multiple categories]() to the expense. Leave the field as **No** if there is no need to add on to the expense.
    - **Expenses must include both the county and department the expense was made for.**
    - **Sales tax must be split out from the total amount in order to be reimbursable.**
11. Add a receipt to the **Receipts** section, if required for the expense:
    - Drag and drop the receipt image from a computer.
    - Select **Upload from Computer** to browse and select the receipt or drag and drop the receipt image from a computer.
      🗎 **NOTE:** Users can upload up to 20 receipts (20MB total) in JPG, PDF, or PNG formats.
    - Select **Select from Gallery** to choose an already uploaded receipt from the [Receipt Gallery]().
12. Select **Save** to return to the Create Expense Report page after completing all fields

1. Review the following from the **Reports** section:
    - **In Progress**:
        - Displays expense reports in an Unsubmitted or Returned status
        - Only appears when there are In Progress expense reports
    - **Pending**:
        - Displays expense reports in a Submitted, Approved, Partially Approved, or Pending Paid status
        - Only appears when there are Pending expense reports
        - If necessary, a user can recall a submitted expense report
    - **History**:
        - Displays expense reports in a Paid status
        - Only appears when there are historical expense reports
2. Tap **+** from the **Reports** section.
3. Tap **Title** to give the expense report a unique name, then tap **Save**.
4. Tap **Business Purpose** and enter text as applicable, then tap **Done**.
5. Tap **Comments** to add any additional detail, then tap **Add**.
6. Tap **Add Expense** and select one of the options for adding an expense:
    - **Add Existing Expense** to attach an existing expense from the Expenses page.
    - **Create New Expense** to create a New Expense.

- As a user adds expenses to the expense report, the dollar figure will update based on the dollar amounts.

7. Tap **Save**.