

# How to Fill out a Reimbursement Report

This guide is meant to be a tool to help you fill out and submit a reimbursement report. Please see the Reimbursement Report Guide for information about what sort of documentation you need to provide depending on the type of reimbursement you are submitting.

1. Fill out the box on the top left of the reimbursement report.
  - a. Name:
    - i. Type your first and last name
  - b. Student ID:
    - i. Type your student ID
  - c. Phone number:
    - i. Type your phone number (optional: this gives us another method to contact you if we cannot reach you via email)
  - d. Address:
    - i. Type your address
  - e. Email:
    - i. type your student email
2. Fill out the box below the student information section.
  - a. Dates of Travel:
    - i. If you are seeking to be reimbursed for registration/membership, please write the date of the transaction.
    - ii. If you are seeking to be reimbursed for mileage, hotel, rental vehicle, etc. type the start and end dates of the trip/event.
  - b. Location:
    - i. If you are seeking to be reimburse for a registration/membership, please type “Stevens Point, WI.”
      1. If you paid for the registration/membership in person at the event you attended, please type the location of the event.
    - ii. If you are seeking to be reimbursed for mileage, hotel, rental vehicle, etc. please type the start and end dates of the trip/event.
3. Fill out the box with the lines, “business purpose” and “other travelers.”
  - a. Business purpose:
    - i. Type a one sentence explanation as to why the items you purchased relate to your club.
      1. For a registration reimbursement, you could write something as simple as, “I paid for this registration fee to attend \_\_\_\_\_ with my student organization.”
      2. For a mileage reimbursement, you could write something as simple as, “I drove my personal vehicle for \_\_\_\_\_ with my student organization because we needed \_\_\_\_\_ (another driver, a way to get from point a to b, etc.)”
      3. For a hotel reimbursement, you could write something as simple as, “I paid for a hotel room for my student organization so we could spend the night in \_\_\_\_\_ (location) to attend the next day of \_\_\_\_\_ (name of the event or conference).
    - ii. Other travelers:

1. Only applicable for meal reimbursement or hotel reimbursement.
      - a. Type the names of the individuals in attendance at the meeting which food was provided for
      - b. Type the names of the individuals who stayed in the hotel for the trip.
4. Fill out the box with the lines, “date,” “description,” mileage,” “mileage reimbursement amount,” “total amount.”
  - a. Date:
    - i. Type the date of which you purchased the item/the date you drove to another location for the organization
  - b. Description:
    - i. A couple word description of what the item is.
      1. Registration: “registration for \_\_\_ conference.
      2. Mileage: “I drove from \_\_\_ to \_\_\_.”
      3. Hotel: “Hotel room for \_\_\_\_\_ (name of event or conference).”
      4. Rental Vehicle: “Rental vehicle for \_\_\_\_\_ (name of event or conference).”
    - ii. Miles:
      1. Only applicable for mileage reimbursements.
        - a. Type the number of miles you want to be reimbursed for.
    - iii. Mileage reimbursement amount:
      1. Only applicable for mileage reimbursements.
        - a. This will automatically be calculated for you. If it is not, multiply the number of miles x the rate.
          - i. The rate is currently \$0.43.
    - iv. Total amount:
      1. Type the amount you are seeking to be reimbursed for.
        - a. Ex: a registration ticket is \$200 but you only want to be reimbursed for \$100. Type \$100 in the “total amount” box.
    - v. Total reimbursement request:
      1. Add all numbers in the total amount column.
5. Sign the document.
  - a. Claimant’s signature:
    - i. The student that is being reimbursed needs to sign the document here.
  - b. Claimant's name printed:
    - i. The student that is being reimbursed needs to type their name here.
  - c. Org. treasurer’s signature:
    - i. Your student organization’s treasurer needs to sign the document here.
  - d. Org. treasurer's name printed:
    - i. Your student organization’s treasurer needs to type their name here.
6. Fill out a non-employee profile report.
  - a. Follow the link at the bottom of the reimbursement report or the link included below to submit a non-employee profile. The profiles allow the SGA Budget Director to submit the reimbursement report for you.
    - i. [https://uwsp.az1.qualtrics.com/jfe/form/SV\\_6nj0VeNO4D0ggYJ?Q\\_JFE=qdg](https://uwsp.az1.qualtrics.com/jfe/form/SV_6nj0VeNO4D0ggYJ?Q_JFE=qdg)
7. Treasurer’s Only:
  - a. Fill out the box with the “SGA account #,” “org. name,” and “treasurer.”
    - i. Travel and non-travel boxes:

1. If the reimbursement is for mileage, check travel.
2. If the reimbursement is for anything else, check non-travel.
- ii. SGA account #:
  1. Type the 6-digit account number for your organization
    - a. If you don't know it, reach out to the SGA Budget Director. They can provide this information to you.
- iii. Org. name:
  1. Type your organization's name
- iv. Treasurer:
  1. Type the name of your organization's treasurer

8. Common questions/problems:

- a. Do I need to sign the document with DocuSign?
  - i. No, a typed name is acceptable.
- b. How do I sign the document?
  - i. You can just type your signature.
- c. I typed my name into the "claimant's name printed" line and it auto filled the org. treasurer's name printed! What do I do?
  - i. Just ignore it. Both of the following are acceptable.

1. Ex:

print or scanning this form to the SGA office

Claimant's Signature: _____
Claimant's Name Printed: <u>Name of student being reimbursed</u>
Org. Treasurer's Signature: _____
Org. Treasurer's Name Printed: <u>Name of student being reimbursed</u>

2.

print or scanning this form to the SGA office

Claimant's Signature: _____
Claimant's Name Printed: <u>Name of the treasurer of your student organization</u>
Org. Treasurer's Signature: _____
Org. Treasurer's Name Printed: <u>Name of the treasurer of your student organization</u>