

Travel Expenses Reimbursement

Sign into the Portal (villagestaxaide.com – Counselor Page and Client Facilitator Page)

Click on Reimbursements

- Click on New Reimbursement
- Select Assignment ID you are requesting reimbursement for

New screen will appear; select Reimbursement type from the dropdown: Flat Rate or Itemized

For Flat Rate:

- Just check the box right below where it says Verify and Submit Reimbursement, then click Submit for approval.

If you have entered direct deposit information you should receive the funds in your bank account once it has been approved. If you have not entered direct deposit information, it may take a few weeks, but you will receive a check in the mail at the address in your Contact record in the Portal

For Itemized:

- Choose Itemized from the drop down
- Funding Code – Should automatically fill in whatever assignment you chose and Federal Grants
- You must enter a line item for each day you worked and how many round-trip miles. Begin by clicking the plus sign
 - Enter Date worked, program code must be Tax Aide, Expense type should be Counseling Activities. Choose which mileage rate you would like to be reimbursed for up to 58 cents, enter the round-trip miles. The dollar amount will fill in automatically. Click the icon at the front of that line to “save” this.
 - To enter another just like it click “clone line item” at the front of the line after you have saved it, then “edit” the new one to change the date or round-trip miles
 - Continue adding line items until you have entered all the dates you have worked
 - Make sure you “save” each line item
 - Then, only when you are completely finished, click the box below where it says verify and submit.

Click Submit for Approval

Again, If you have entered direct deposit information you should receive the funds in your bank account once it has been approved. If you have not entered direct deposit information, it may take a few weeks, but you will receive a check in the mail at the address in your Contact record in the Portal.