

IMPA Expense Reimbursement Request Process

Requestors: You will need an **electronic copy of the receipt or invoice to upload**. Before you start this process, save that file to your computer somewhere you can easily find. If you have a paper copy, scan or take a picture of the receipt(s) or invoice(s) and save it to your phone or computer.

1. **Click this [link](https://interlakemusic.sharepoint.com/:l:/s/InterlakeMusicParentsAssociation/FEMsivggzD5Bq9WDC_0eWGUB9V07ukM_dmswZHXiITpybA):**
https://interlakemusic.sharepoint.com/:l:/s/InterlakeMusicParentsAssociation/FEMsivggzD5Bq9WDC_0eWGUB9V07ukM_dmswZHXiITpybA

*Tip: save this link as a Favorite!

2. **Click on the blue “+New” button** to open a new request form.
3. **Complete the form.** You will need to enter the following information:
 1. **Requestor Name** - Your first and last name
 2. **Requestor Email** - Your email address
 3. **Approver:** Select one of the following: General; Band VP, Jazz BP; Orchestra VP; Choir VP; Treasurer
 4. **Expense details: Item** - A short title of describing the expense(s)
 5. **Expense details: Description** - a brief description of the expense(s)
 6. **Amount:** dollar amount of expense(s) to be reimbursed
 7. **Music group:** Select one of the following - Band, Jazz, Orchestra, Choir, or General (this will inform the Treasurer which program fund to draw from)
 8. **Category:** Select Clinician, Trips, Director Designation, Supplies - OR type in a new category
 9. **Receipt:** click on “add attachments.” **Browse for and select the electronic file of the invoice or receipt to attach.** This may be a picture file (.JPG, .PNG, .TIFF) OR PDF OR .doc file.
 10. **Payments: Pay To** - Name of the recipient (this is the name that the check will be written out to)
 11. **Payments: Deliver to** - Select “In invoice” or “In Person” OR type in mailing address (the address that the check will be mailed to via USPS)
4. If you are ready to submit this for approval, **check the “Ready for review?” Yes box**. If you are not ready for it to be approved, leave this box unchecked and you will be able to return to (and edit) it later.
5. **Select “Save.”** If you have checked the “Ready for review” box, when you select “Save,” this means your request has been submitted.

An email will be sent to you (the **Requestor**) to confirm that your expense reimbursement request has been successfully submitted. An email will also be sent to the **Approvers**. (Note: if you submit a request on your own behalf, you will not be allowed to approve the request.)

6. The **Approver** will then review and approve the expense request.

For **Approvers**: You need to sign in with [youruser]@interlakemusic.org and password to view the details of the item - and make sure click on the correct link to approve or reject the item. **Do NOT set the status as "APPROVED" directly on the request item itself. (It won't work if you do that.)**

7. After approval, the **Treasurer** will be sent an email with a message that a check needs to be generated and sent to the recipient. You, the requestor, will also receive an email to notify you when the request has been approved.