HNBA Event Approval
Reimbursement Request

User Guide

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A. Overview

The purpose of this document is to outline the Hispanic National Bar Association’s (HNBA) Event Approval and Reimbursement Request process. Requests for event reimbursement should be submitted for approval prior to the event occurring. However, once an event has ended, reimbursement requests may be honored with appropriate executive authorization.

All requests must be submitted on the following web site: https://hnba.sharepoint.com/sites/hnbainnovation/reimbursements/SitePages/HomePage.aspx

B. Event Approval Process

Once the requestor has access the site, two buttons on the left of the HomePage are provided for submitting a New Event request or viewing Existing Event request information and status.
Submitting a New Event

1. To begin a new event registration, select the **New Event** button.

2. Event details should be entered on the resulting screen. There are two defined **Event Request Types**: DSC and Region. Selecting **Region** displays a drop down on the left that lists all available Region options that may host the event. Selecting **DSC** displays a drop down on the left that lists all DSC options that may host the event.
3. Once the event details have been entered, the **Next** button will become available. Select **Next** to enter additional details.

4. Select the correct **Cost Description** option from the drop down menu, and then enter the amount and description. Next, select the **Add Item** button on the right to add the costs to a table in the lower left of the window, where all items added and their costs will accrue. The Add Item button may be selected repeatedly for as many different cost items as need. When finished, select **Save Expense Report** button to save.

5. On the next screen select the **Funds Type** drop down to define the type of funding source to be used, and enter in the amount and source. Then select the **Add Funds Item** button to add the source(s) for funding to a table in the lower left of the window. This button may be selected repeatedly for as many different sources as needed.
Once complete, select the **Save Pre Event Request** button at the bottom right and the request will be submitted for approval.

**Viewing Existing Event**

1. Select the **Existing Events** button.

2. All events that have already been submitted are displayed with their current approval status. The **green** bar under an event indicates the event has been approved. The **Search By Event Name** option will filter through all occurrences to assist with locating a specific event. To view a particular event’s details, select the **Details** button to the right of the event of interest.
3. Selecting a **Details** page lists all event information and funds submitted.

4. When event requests are submitted, there are two approval stages. Once a request has been evaluated, a final email will be sent to the requestor indicating whether the event was Approved or Denied.
C. Event Reimbursement Process

The two buttons on the right side of the HomePage are for submitting a new reimbursement request and viewing existing reimbursement request information and status.

**Submitting a New Reimbursement**

1. To begin the request for a new reimbursement, select the **New Reimbursement** button.
2. Within the Reimbursement process, there are four types of reimbursements listed in the Select Request Type dropdown. The DSC and Region request types will display all events that were previously approved in the Event Approval Process. The Over $25K request types will initiate a new reimbursement request for submission, not based on any previously approved event.

The Search By Event Name option will filter through all events previously approved.

![Image of Select Request Type dropdown and Search By Event Name]

3. For DSC and Region events, select the Edit icon to submit Check Payment information.

![Image of Event Information dialog box]

3a. Once Check Payment Information has been added, toggle the Impact Tracker button to yes to enable, and select the Request Reimbursement button, which will activate (turn blue) once form is completely filled, save the record, and navigate to the screen for entering Expenses.
4. For **Over $25K** events, selecting either option will redirect to the Event Details screen. Enter basic event details here: **Name**, **Location**, and **Date**.

4a. Contacts may be either searched for or selected by searching existing contacts (left side of window), or a new contact may be created by clicking on the + icon and entering contact details (right side of window).
4b. Selecting the **Submit** button after choosing an existing contact, or creating a new contact and selecting the **Save** icon, will navigate to the screen for entering **Expenses**.

5. The **Expense Description** drop down allows for categorizing the type of expense. Enter expense information, attach a receipt, and select **Submit Expense Item** for each receipt to be uploaded. When finished, select **Save Expense Report <Event Name>** to save the record.
6. Expense details will display at the bottom of the window, and the total expense amount will automatically calculate for each expense entered.

7. To view individual receipts, select the down arrow next to the expense and the document name will change. Clicking on the document name will then open it for downloading and viewing. Select the Save Expense Report for <Event Name> button to submit the reimbursement request.
**Viewing Existing Reimbursements**

1. To view reimbursements already processed, select the **Existing Reimbursement** button.

2. All reimbursements that have already been submitted are displayed with their approval status. The **green** bar under an event indicates that the event has been approved. The **Search By Event Name** option will filter through all events. To view a particular event’s detail, select the **Details** button to the right of that event.
3. The **Request Details** page lists all reimbursement information and expenses submitted.

![Request Details Image]

4. When event reimbursements are submitted, there are two approval stages. Once a request has been evaluated, a final email will be sent to the requestor indicating whether the reimbursement was Approved or Denied.

![Reimbursement Request Image]