SIMPLY MOBILIZING USA

Expense Reimbursement Instructions

WHAT YOU WILL NEED:

1. Digital forms – get most current version at www.simplymobilizing.us/downloads
2. Digital receipts – including paper receipts scanned or imaged with good legibility
3. A computer to prepare and submit the Expense Reimbursement Request and receipts

WHAT YOU MUST DO TO PREPARE:

1. Download current forms and use "unzip" (Extract all) into 3 separate files.
2. Read and follow the Instructions carefully.
3. Rename the "SMUSA Reimb Form.xlsx" file, replacing "SMUSA" with your Lastname and Date in yyyy-mm-dd format. Example: "***Johnson 2024-02-08*** Reimb Form.xlsx".
4. Open & edit the Reimb Form spreadsheet and complete the form. Please ***do not use Cut/Paste*** when doing so. Use a separate row in the spreadsheet for each expense / receipt. Place an "X" in the checkmark column *if the expense has a receipt.* When complete, type "/s/" followed by your name, type the name of the Requestor (usually the same person as signing), and the mailing address for the reimbursement. Note that only US addresses are acceptable.
5. It is the Requestor's duty to assembly all receipts in a usable manner. ***Do not submit individual receipts as separate files***. The most common methods are to combine images into either a Word document or a PDF document. The Zip file contains a Word document but you can create your own. Use Cut/Paste to add images beginning on the 1st page. Add pages as needed. Make sure images are readable and do not overlap. The Word or PDF document must match have the same prefix (example: "***Johnson 2024-02-08*** Reimb Receipts.docx") as the Request form.
6. Conduct a final review and comparison of the spreadsheet with the receipts, and confirm that the total amount of reimbursement is correct.

> **If you do not have a receipt for an item**, type an explanation in a blank area of the Receipts document providing date, who was paid, purpose, amount, and a brief explanation as to why there is no receipt.

HOW TO SUBMIT YOUR REQUEST

1. Prepare an email with a Subject of "SMUSA Reimbursement {name} {yyyy-mm-dd}". Example: SMUSA Reimbursement ***Johnson 2024-02-08***
2. Attach the two files (Reimb Form.xlsx and Reimb Receipts.docx/.pdf) you prepared above.
3. Send the email to CFO@simplymobilizing.us.

END OF INSTRUCTIONS