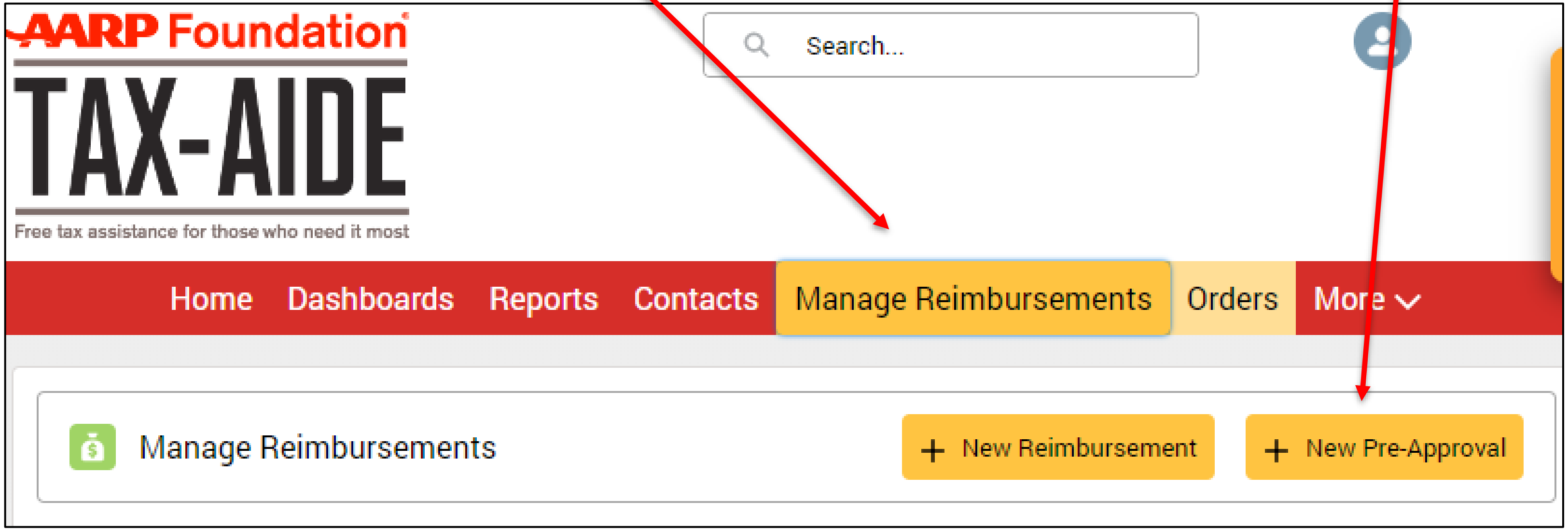
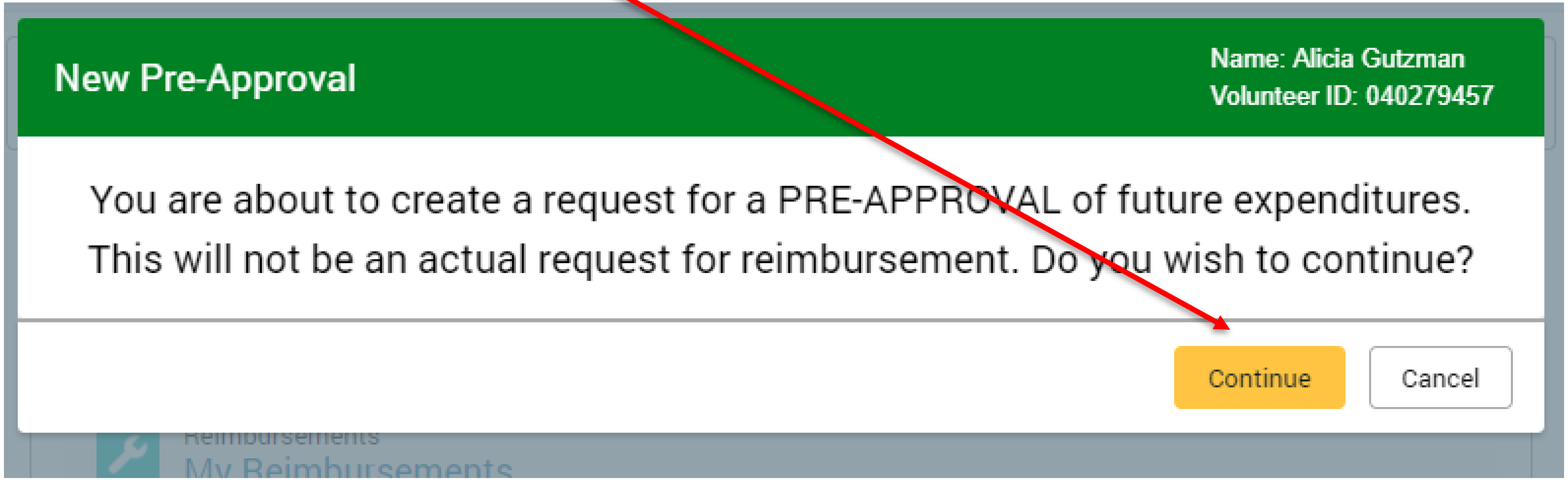
Submitting a Pre-Approval

Select "Manage Reimbursements" tab and "+ New Pre-Approval"



Submitting a Pre-Approval

Select “Continue” when “New Pre-Approval” box is displayed.

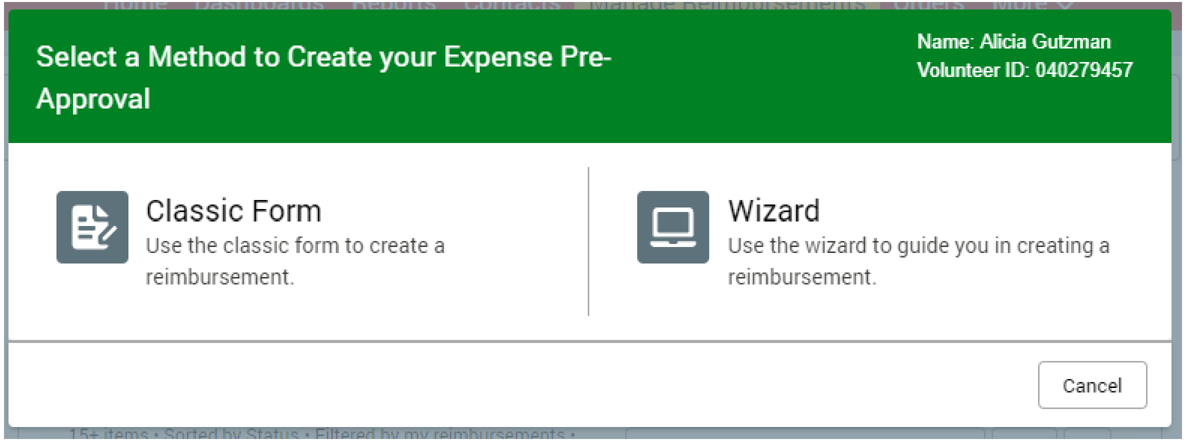


Submitting a Pre-Approval

NEW – Two options:

1. Classic Form - Same steps users have been following.

2. Wizard - A guided experience, prompting the user through the steps as each one is completed.



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Submitting a Pre-Approval

Wizard form

- Guides the user through the steps
- Mobile Friendly
- Once saved cannot return to Wizard form

Classic form

- Helpful for users who are comfortable with current expense form
- Users who submit pre-approvals often may also find the Classic form to be quicker

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Submitting a Pre-Approval

WIZARD

STEP 1

Volunteer selects appropriate assignment ID from list displayed.

1 2 3 4 5 6 7

Step 1: Select Assignment for Pre-Approval

ASSIGNMENT ID	POSITION NAME	PROGRAM LOCATION	STATUS	START DATE	EN
AS00545823	TA-R10-AZ1 Assistant State Coordinator		Approved	May 15, 2018	
AS00591373	TA-R10-AZ1 Administration Specialist		Approved	Jun 1, 2019	
AS00032702	TA-R10-AZ1-D09-S60050902 Counselor		Approved	Sep 20, 2005	
AS00032703	TA-R10-AZ1-D09 Instructor		Approved	Dec 14, 2005	
AS00032704	TA-R10-AZ1-D09-S60050902 Electronic Return Originator		Approved	Sep 19, 2005	

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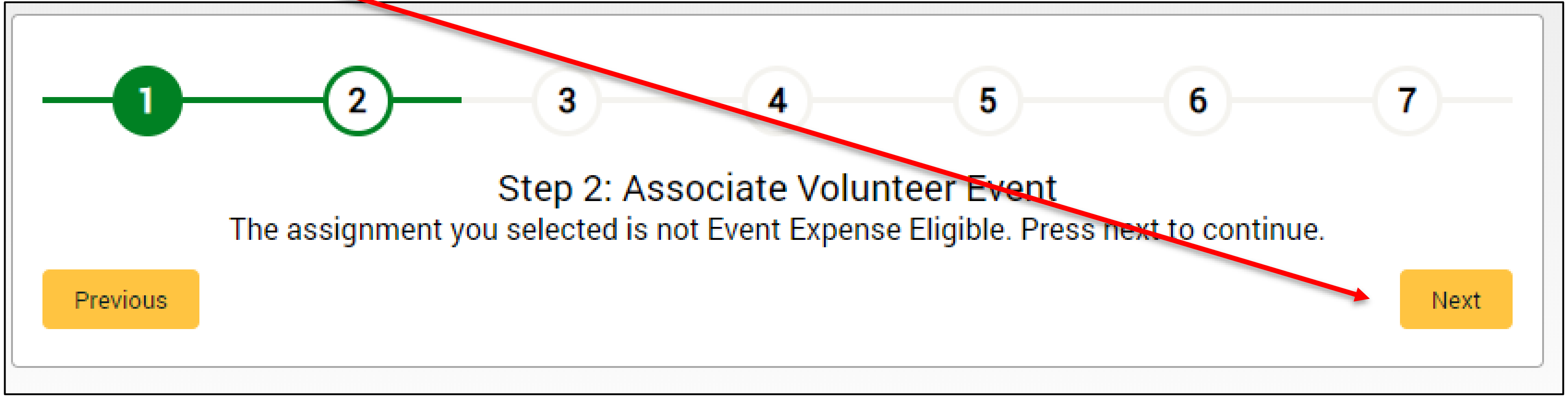
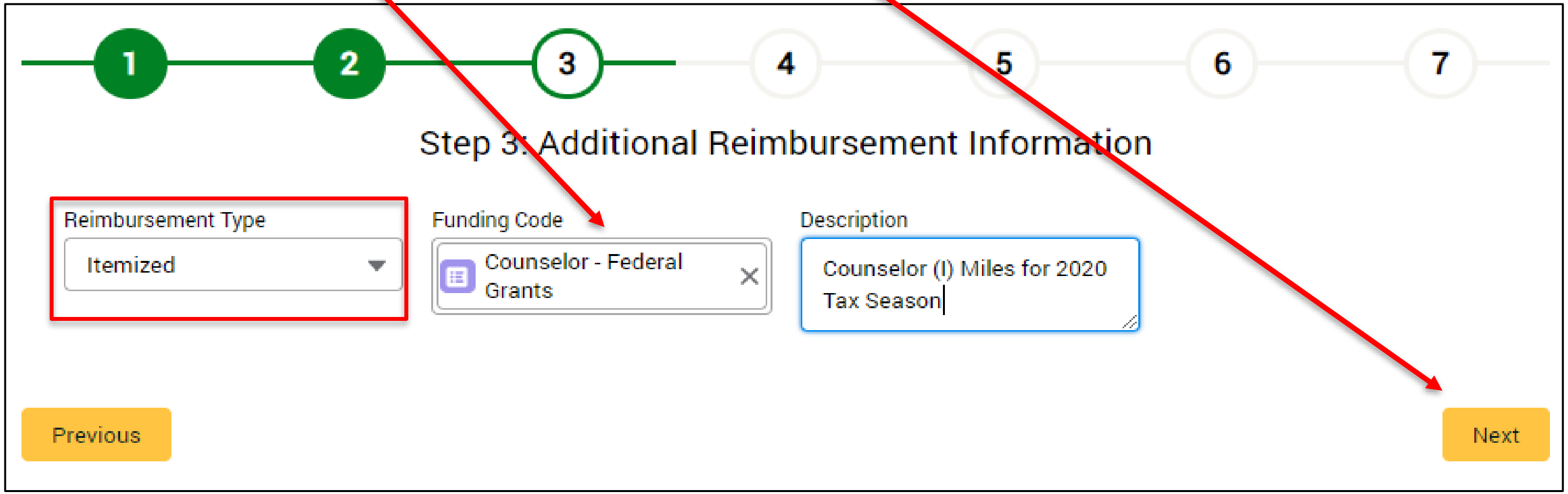
STEP 2 – This feature is not used by Tax-Aide. Select "Next".



Submitting a Pre-Approval

STEP 3 – Reimbursement Type is "Itemized"
Funding code automatically populates.
Add description. Select "Next".



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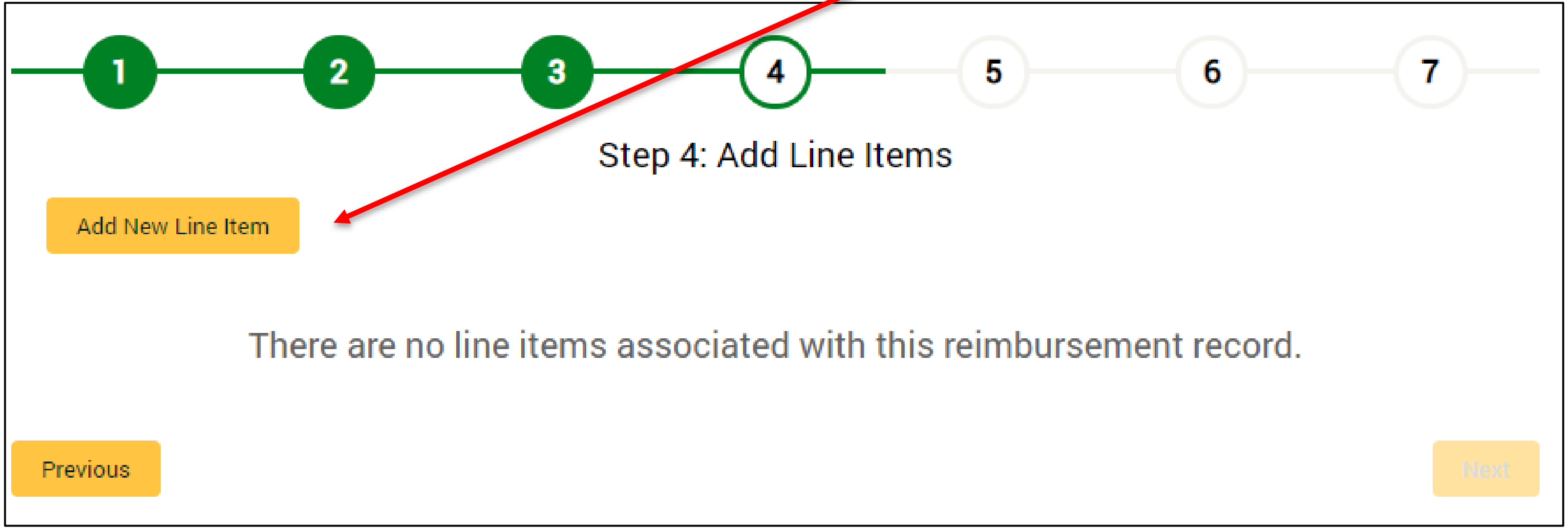
STEP 4 – Select “Add New Line Item”.



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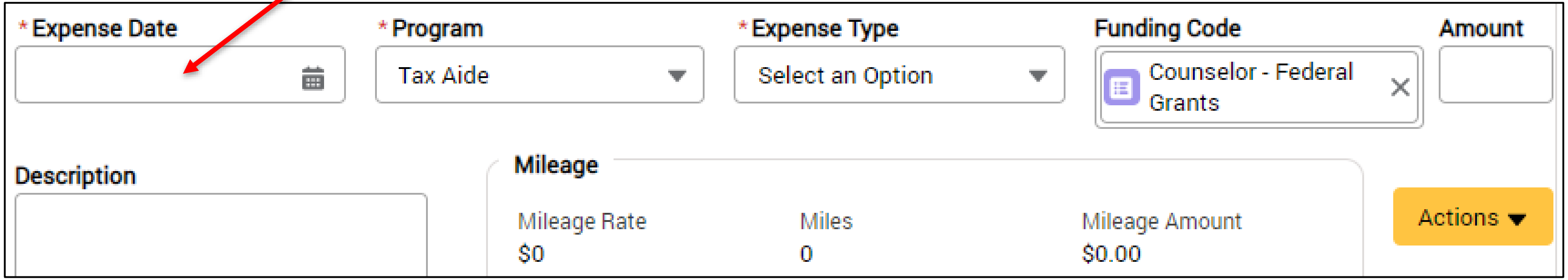
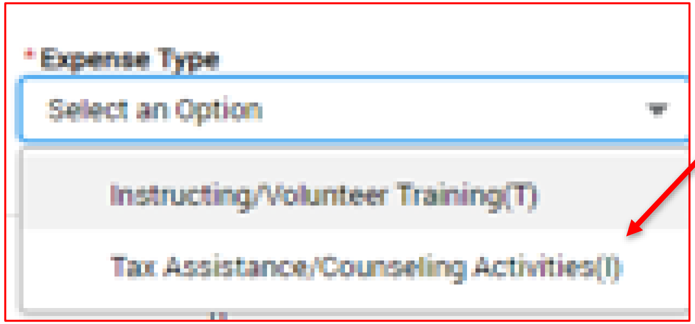
Submitting a Pre-Approval

Enter Expense Date



Submitting a Pre-Approval

Choose "Tax Assistance/Counseling Activities (I)" from Expense Type drop down menu.



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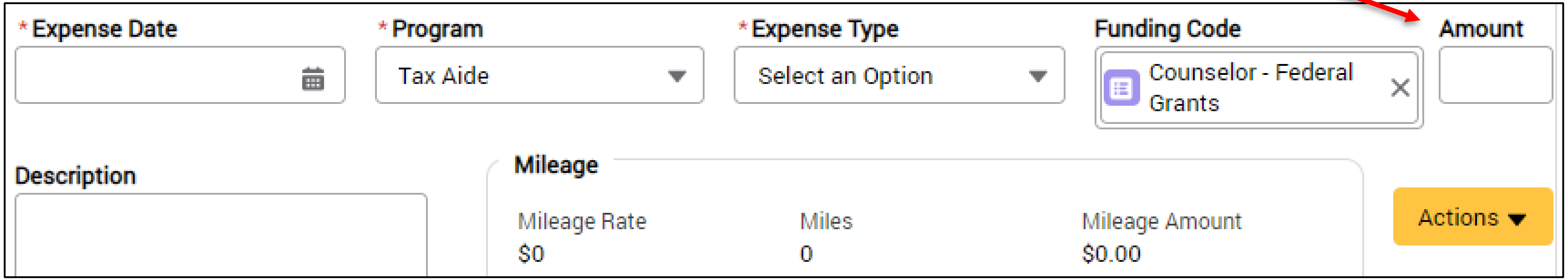
Enter dollar amount.

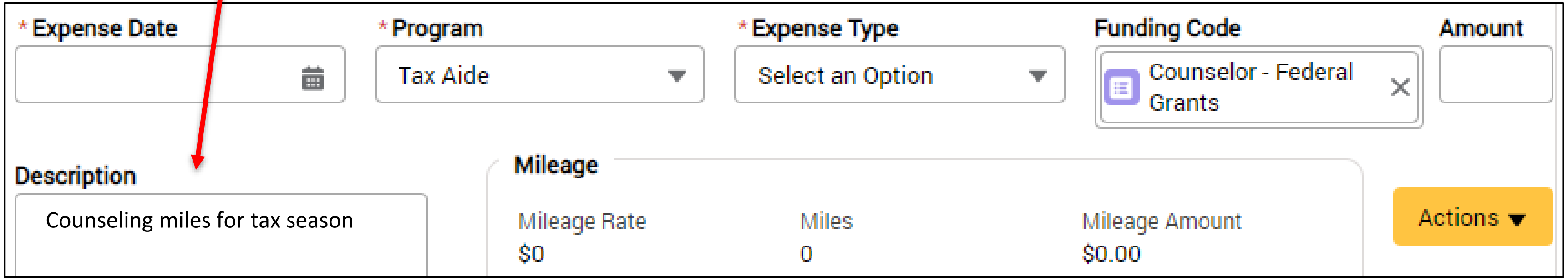
THIS AMOUNT SHOULD NEVER

BE LESS THAN STATE CAP OF $400.



Submitting a Pre-Approval

Enter description



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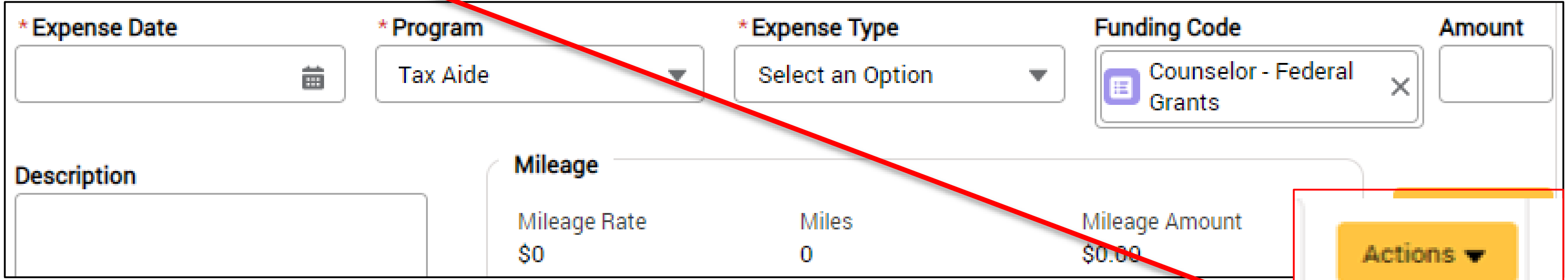
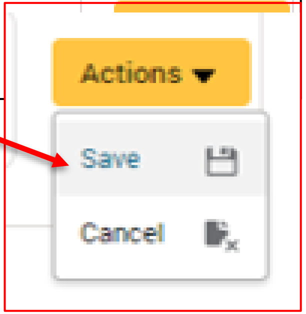
Submitting a Pre-Approval

Choose “Save” from Actions drop down menu.





Success message will appear.

Submitting a Pre-Approval

After a “Line Item” has been saved, the “Actions” drop down menu displays a different set of options.

Now the option to Edit, Delete, or Clone the “Line Item” are available for use.

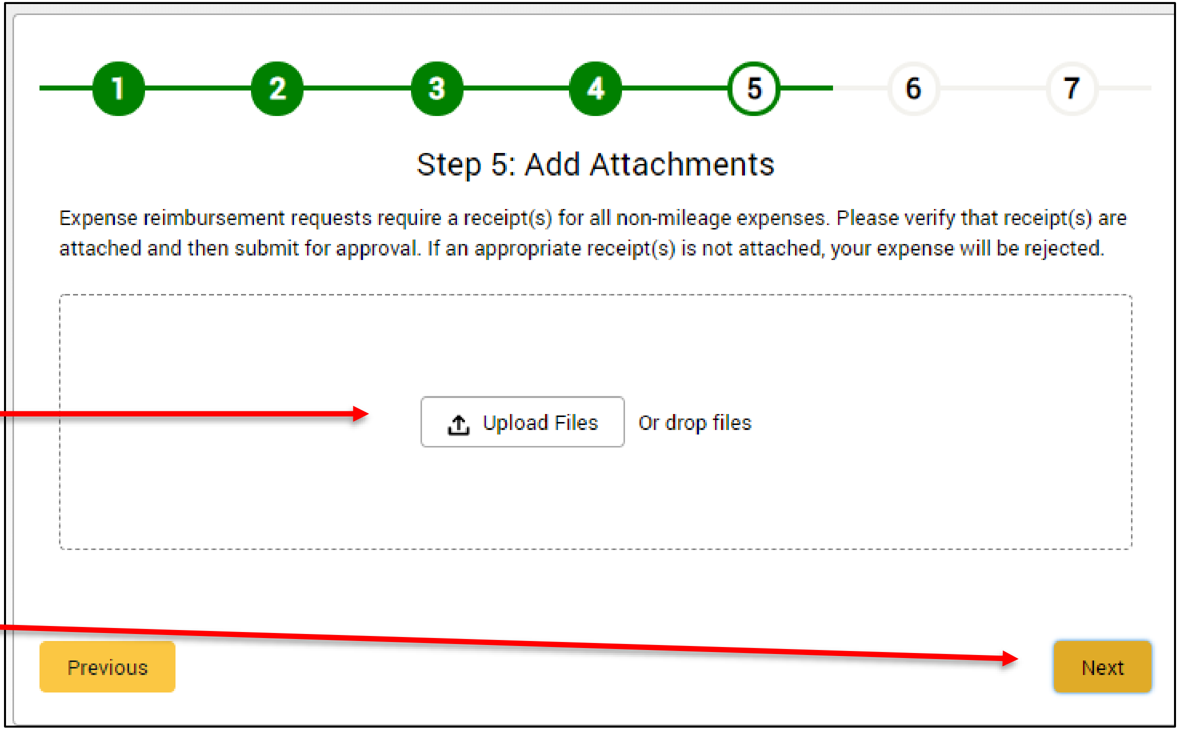
Submitting a Pre-Approval

After successfully entering required information, select Next to continue to STEP 5.

Submitting a Pre-Approval

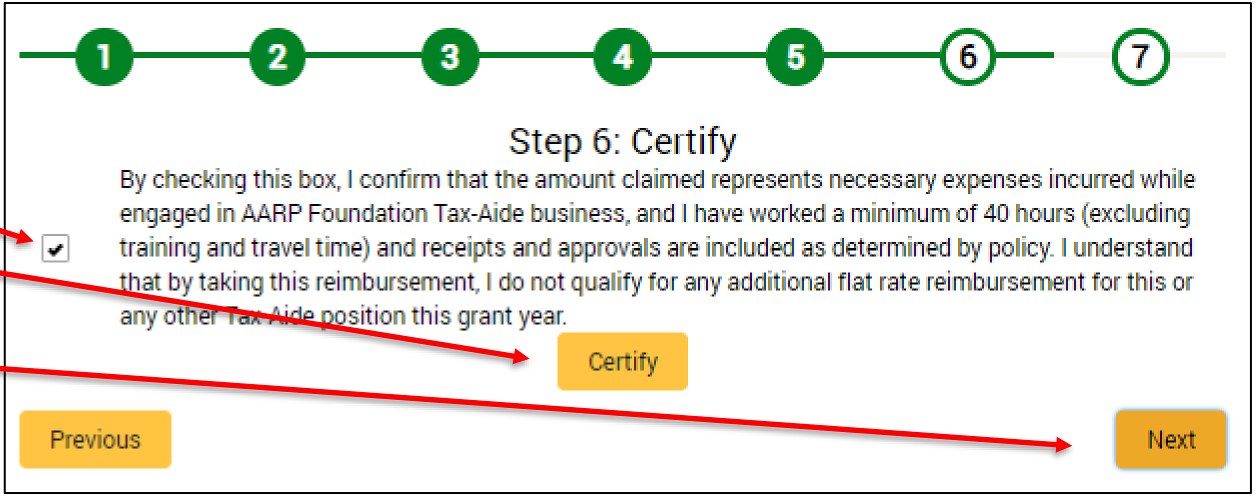
STEP 5 – If required, upload or drop receipts.

Select “Next”.



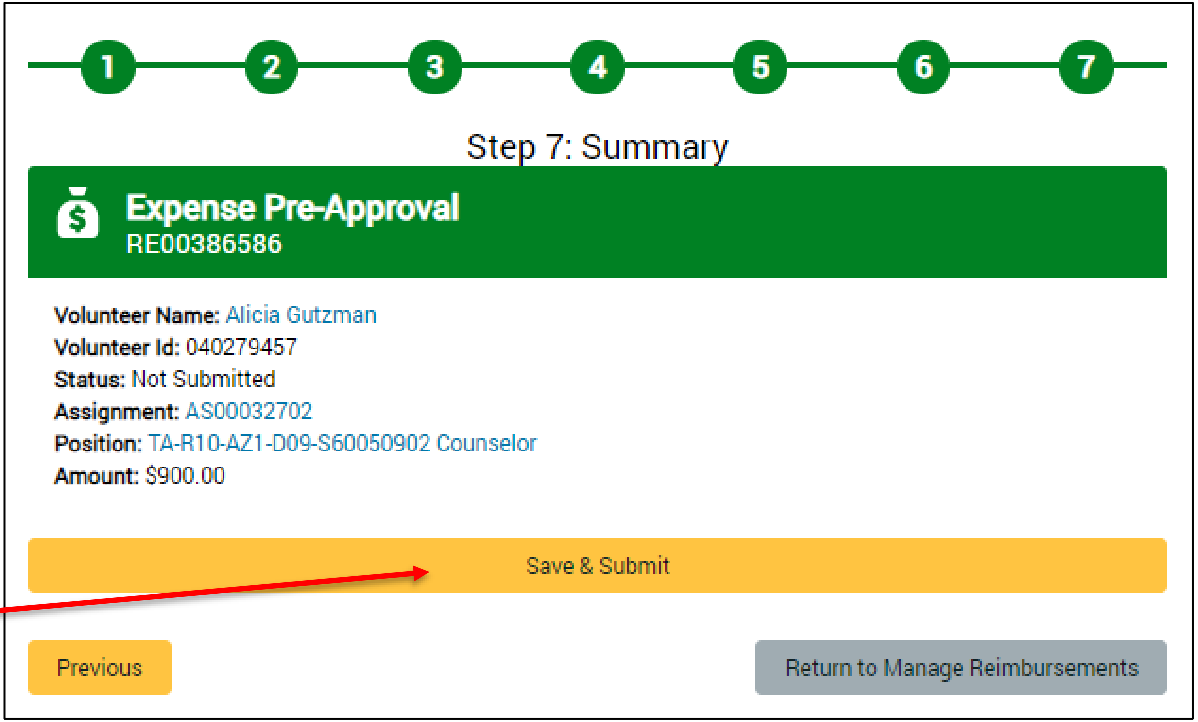
Submitting a Pre-Approval

STEP 6 – Check the box, select "Certify" and "Next".



Submitting a Pre-Approval

STEP 7 – Summary is displayed. Make a note of Expense Pre-Approval Reimbursement #. Select “Save & Submit”.



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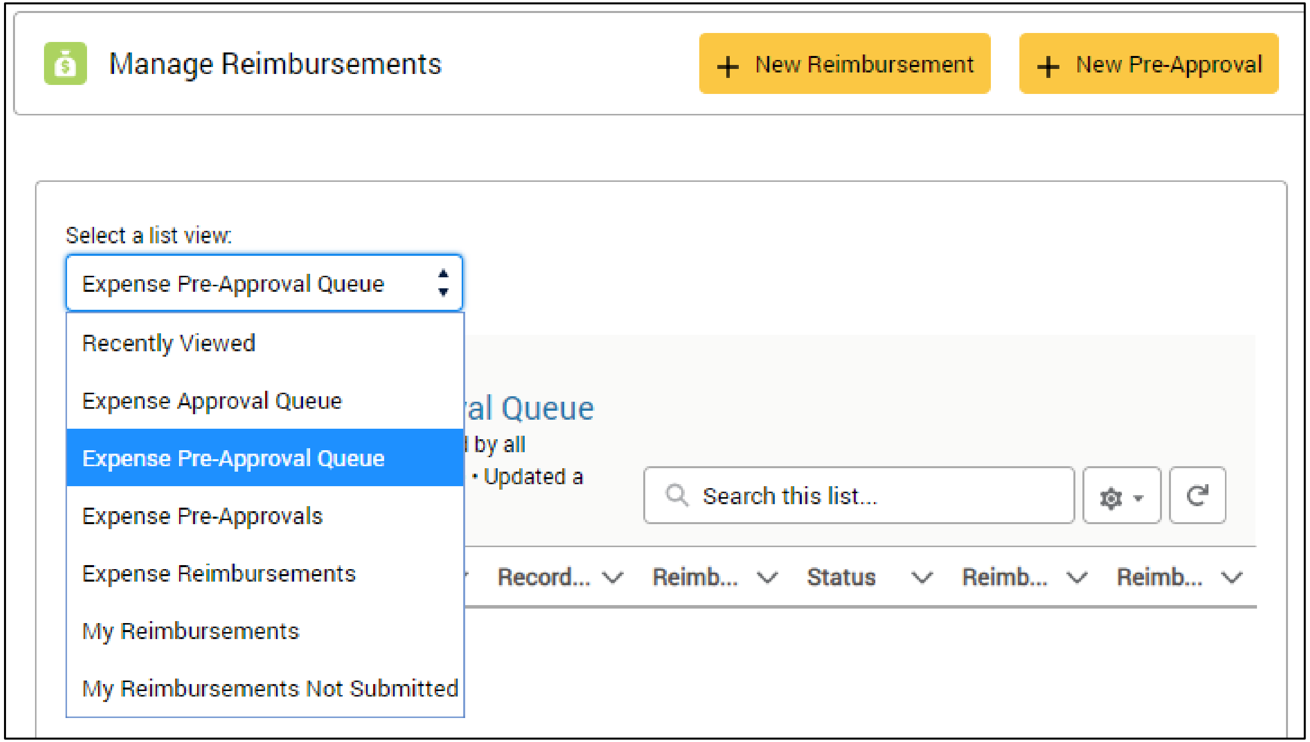
Check Status of Pre-Approval

You can check the status of your Pre-Approval



Submitting a Reimbursement from a Pre-Approval

- Click on the “Reimbursement ID” of the pre-approval for which you are submitting a reimbursement.
- Choose “Create Reimbursement from Pre-Approval” button.
- Edit the line item to reflect actual reimbursement information.