

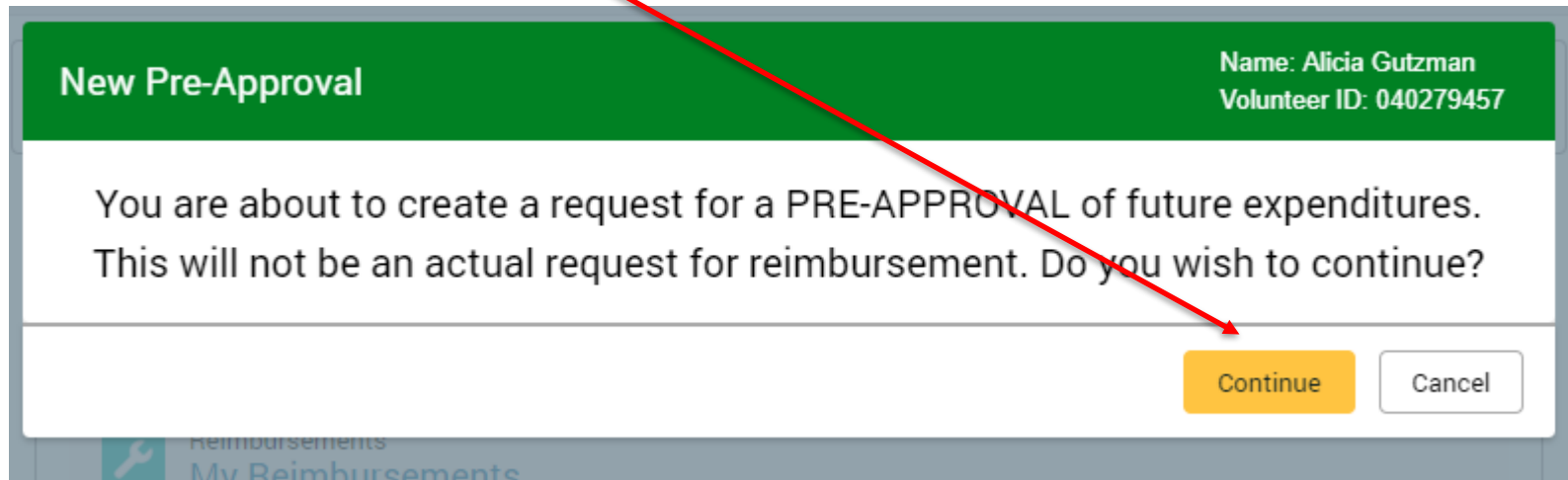
# Submitting a Pre-Approval

Select “Manage Reimbursements” tab and “+ New Pre-Approval”

The screenshot displays the AARP Foundation Tax-Aide web application interface. At the top left, the logo reads "AARP Foundation" in red and "TAX-AIDE" in large black letters, with the tagline "Free tax assistance for those who need it most" below it. A search bar with a magnifying glass icon and the text "Search..." is located in the top right. A navigation bar below the header contains several tabs: "Home", "Dashboards", "Reports", "Contacts", "Manage Reimbursements", "Orders", and "More" with a dropdown arrow. The "Manage Reimbursements" tab is highlighted in yellow. Below the navigation bar, there is a "Manage Reimbursements" button with a green dollar sign icon. To its right are two yellow buttons: "+ New Reimbursement" and "+ New Pre-Approval". Two red arrows point from the text above to the "Manage Reimbursements" tab and the "+ New Pre-Approval" button.

# Submitting a Pre-Approval

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



The screenshot shows a dialog box titled "New Pre-Approval" with a green header. In the top right corner, it displays "Name: Alicia Gutzman" and "Volunteer ID: 040279457". The main text reads: "You are about to create a request for a PRE-APPROVAL of future expenditures. This will not be an actual request for reimbursement. Do you wish to continue?". At the bottom right, there are two buttons: a yellow "Continue" button and a white "Cancel" button. A red arrow points from the text above to the "Continue" button.

# 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.

Select a Method to Create your Expense Pre-Approval

Name: Alicia Gutzman  
Volunteer ID: 040279457

 **Classic Form**  
Use the classic form to create a reimbursement.

 **Wizard**  
Use the wizard to guide you in creating a reimbursement.

Cancel

# 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

# Submitting a Pre-Approval

## WIZARD STEP 1

Volunteer  
selects  
appropriate  
assignment  
ID from list  
displayed.

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	

# Submitting a Pre-Approval

**STEP 2** – This feature is not used by Tax-Aide. Select “Next”.

1 2 3 4 5 6 7

**Step 2: Associate Volunteer Event**  
The assignment you selected is not Event Expense Eligible. Press next to continue.

Previous Next

# Submitting a Pre-Approval

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

Step 3: Additional Reimbursement Information

Reimbursement Type  
Itemized

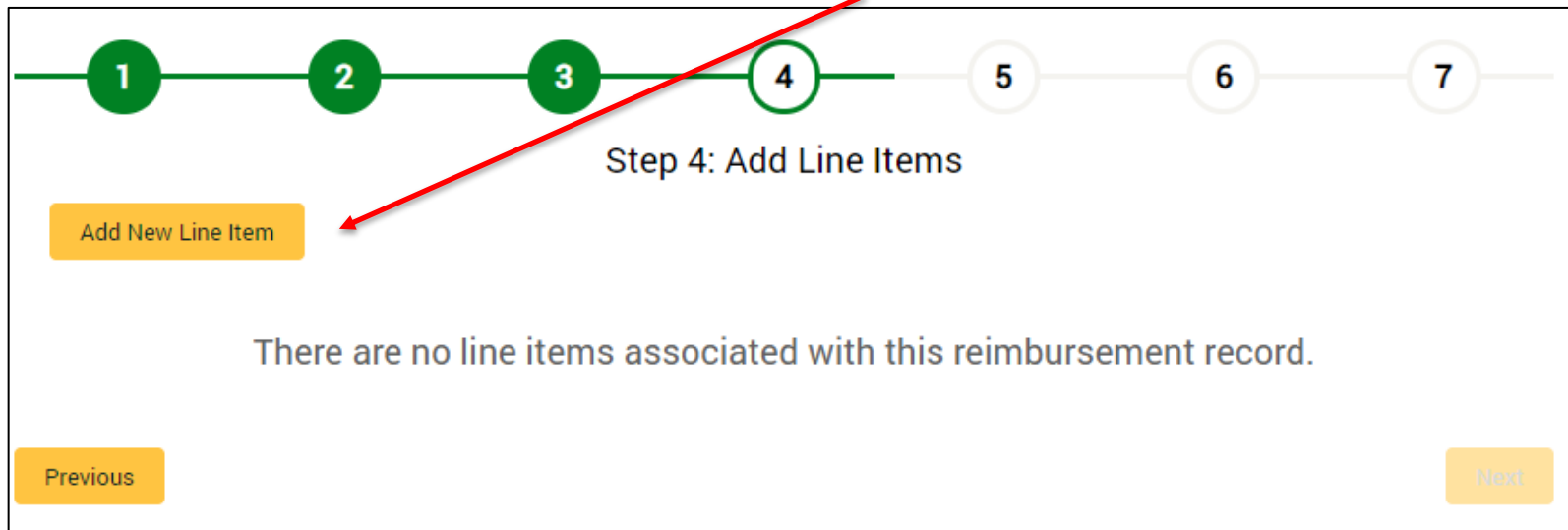
Funding Code  
Counselor - Federal Grants

Description  
Counselor (I) Miles for 2020 Tax Season

Previous Next

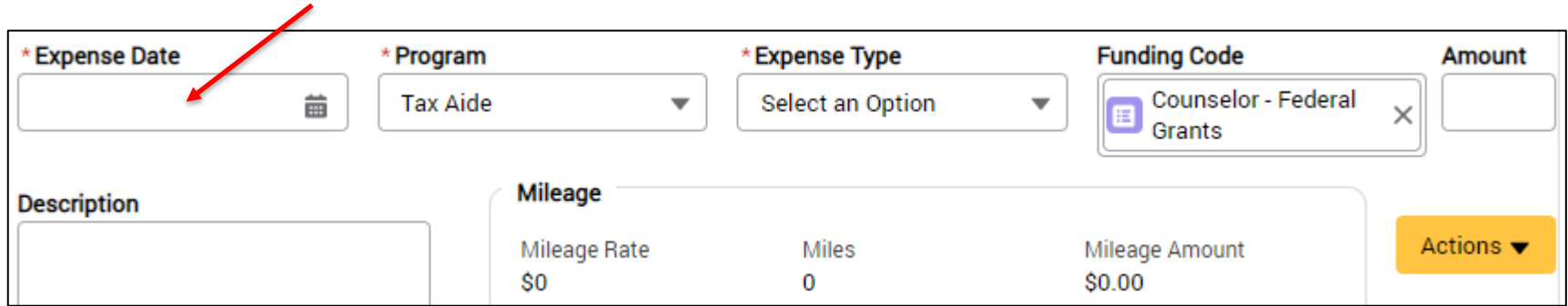
# Submitting a Pre-Approval

## STEP 4 – Select “Add New Line Item”.



# Submitting a Pre-Approval

## Enter Expense Date



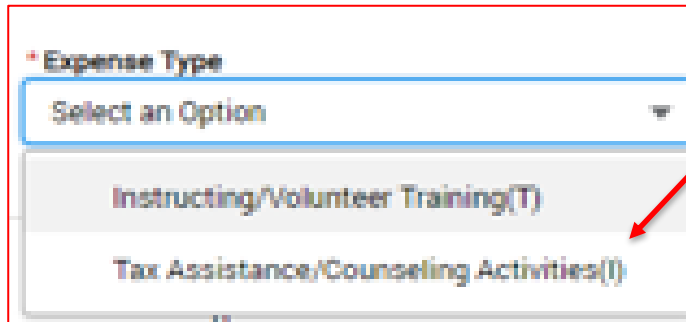
The screenshot shows a form for submitting a pre-approval. A red arrow points to the "Expense Date" field, which is currently empty and has a calendar icon. Other fields include "Program" (Tax Aide), "Expense Type" (Select an Option), "Funding Code" (Counselor - Federal Grants), and "Amount" (empty). Below these fields is a "Description" field and a "Mileage" section with a table.

Mileage	
Mileage Rate	Mileage Amount
\$0	\$0.00

Actions ▼

# Submitting a Pre-Approval

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

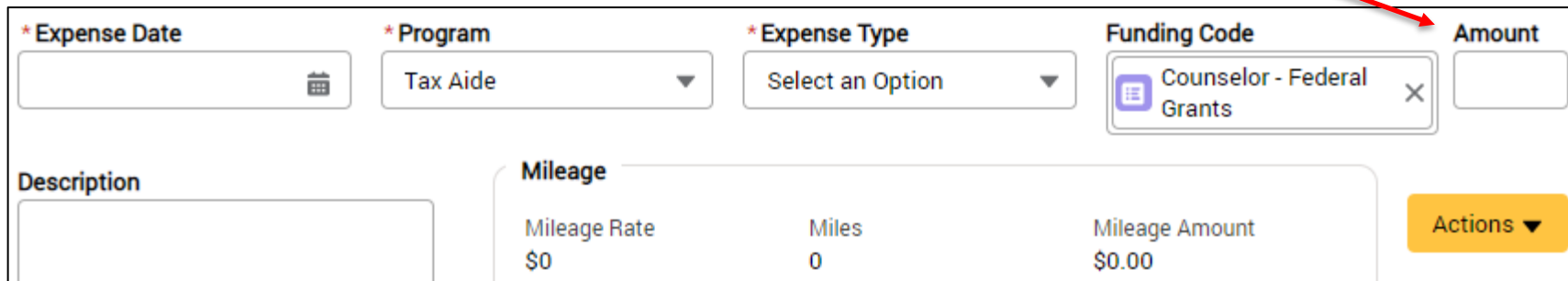


A screenshot of a web form's 'Expense Type' dropdown menu. The menu is open, showing a list of options. The option 'Tax Assistance/Counseling Activities(I)' is highlighted in grey, and a red arrow points to it from the right. The other visible option is 'Instructing/Volunteer Training(T)'. The dropdown is titled 'Expense Type' and has a placeholder text 'Select an Option'.

# Submitting a Pre-Approval

Enter dollar amount.

**THIS AMOUNT SHOULD NEVER  
BE LESS THAN STATE CAP OF \$400.**

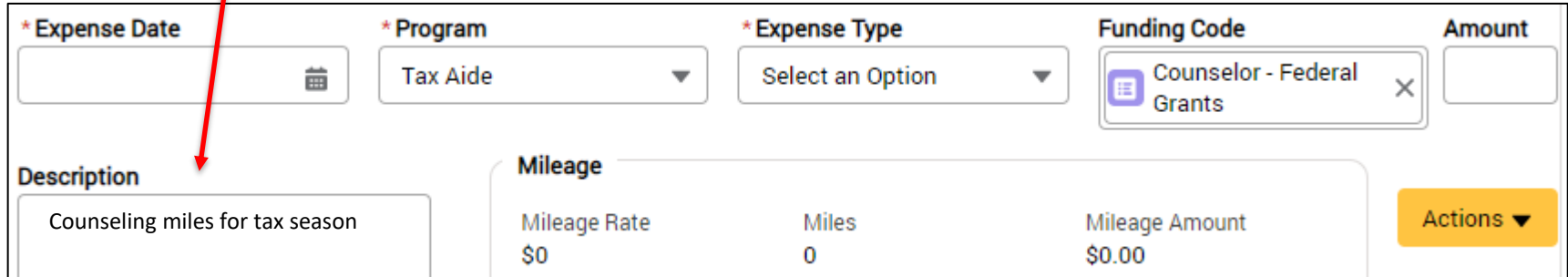


The screenshot shows a form for submitting a pre-approval. A red arrow points from the text above to the 'Amount' input field. The form includes the following fields and sections:

- \* Expense Date:** A date picker field.
- \* Program:** A dropdown menu with 'Tax Aide' selected.
- \* Expense Type:** A dropdown menu with 'Select an Option' selected.
- Funding Code:** A dropdown menu with 'Counselor - Federal Grants' selected.
- Amount:** An empty input field.
- Description:** A text area for describing the expense.
- Mileage:** A section with three columns: 'Mileage Rate' (displaying '\$0'), 'Miles' (displaying '0'), and 'Mileage Amount' (displaying '\$0.00').
- Actions:** A yellow button with a dropdown arrow.

# Submitting a Pre-Approval

Enter description



The screenshot shows a form for submitting a pre-approval. A red arrow points from the text 'Enter description' to the 'Description' input field. The form includes several fields: '\*Expense Date' (calendar icon), '\*Program' (dropdown menu with 'Tax Aide' selected), '\*Expense Type' (dropdown menu with 'Select an Option' selected), 'Funding Code' (tagged 'Counselor - Federal Grants'), and 'Amount' (empty input field). Below these is a 'Description' field containing 'Counseling miles for tax season'. To the right is a 'Mileage' section with a table:

Mileage		
Mileage Rate	Miles	Mileage Amount
\$0	0	\$0.00

An 'Actions' dropdown button is located to the right of the mileage table.

# Submitting a Pre-Approval

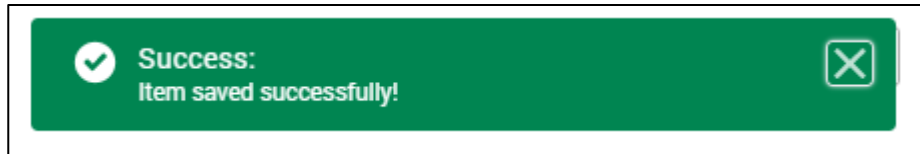
Choose “Save” from Actions drop down menu.

The screenshot shows a form with the following fields and controls:

- \* Expense Date:** A date picker field.
- \* Program:** A dropdown menu with "Tax Aide" selected.
- \* Expense Type:** A dropdown menu with "Select an Option" selected.
- Funding Code:** A tag labeled "Counselor - Federal Grants" with a close button (X).
- Amount:** An empty input field.
- Description:** A text input field.
- Mileage:** A section containing:
  - Mileage Rate:** \$0
  - Miles:** 0
  - Mileage Amount:** \$0.00
- Actions:** A yellow button with a dropdown arrow, which is open to show:
  - Save:** A blue button with a floppy disk icon.
  - Cancel:** A grey button with a trash can icon.

A red arrow points from the text above to the "Save" button in the Actions menu.

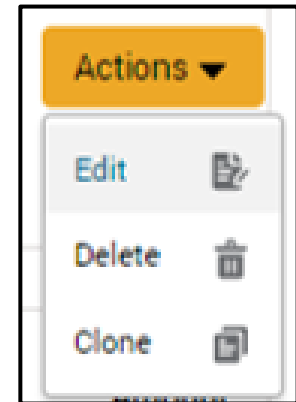
Success message will appear.




# 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  to continue to STEP 5.

# Submitting a Pre-Approval

**STEP 5** – If required, upload or drop receipts.

Select “Next”.

The screenshot shows a progress bar at the top with seven steps. Steps 1 through 5 are highlighted in green, while steps 6 and 7 are in grey. Below the progress bar, the title "Step 5: Add Attachments" is centered. A paragraph of text explains that expense reimbursement requests require receipts for non-mileage expenses and that missing receipts will result in rejection. Below this text is a large dashed rectangular box for file uploads. Inside this box, there is a button labeled "Upload Files" with an upward arrow icon and the text "Or drop files". At the bottom of the form, there are two yellow buttons: "Previous" on the left and "Next" on the right. Two red arrows are overlaid on the image: one points from the left margin to the "Upload Files" button, and the other points from the left margin to the "Next" button.

# Submitting a Pre-Approval

**STEP 6** – Check the box, select “Certify” and “Next”.


The screenshot shows a progress bar at the top with seven steps. Step 6 is highlighted with a green circle. Below the progress bar, the text reads: "Step 6: Certify. By checking this box, I confirm that the amount claimed represents necessary expenses incurred while engaged in AARP Foundation Tax-Aide business, and I have worked a minimum of 40 hours (excluding training and travel time) and receipts and approvals are included as determined by policy. I understand that by taking this reimbursement, I do not qualify for any additional flat rate reimbursement for this or any other Tax-Aide position this grant year." Below the text is a checkbox with a checkmark. At the bottom of the form are three buttons: "Previous", "Certify", and "Next". Red arrows point from the text on the left to the checkbox, the "Certify" button, and the "Next" button.

# Submitting a Pre-Approval

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

1 2 3 4 5 6 7

Step 7: Summary

 **Expense Pre-Approval**  
RE00386586

Volunteer Name: [Alicia Gutzman](#)  
Volunteer Id: 040279457  
Status: Not Submitted  
Assignment: [AS00032702](#)  
Position: [TA-R10-AZ1-D09-S60050902](#) Counselor  
Amount: \$900.00

[Save & Submit](#)

[Previous](#) [Return to Manage Reimbursements](#)

# Check Status of Pre-Approval

You can check the status of your Pre-Approval

The screenshot displays the 'Manage Reimbursements' interface. At the top, there is a header with a green icon and the text 'Manage Reimbursements'. To the right of the header are two yellow buttons: '+ New Reimbursement' and '+ New Pre-Approval'. Below the header, there is a section titled 'Select a list view:' with a dropdown menu. The dropdown menu is open, showing several options: 'Expense Pre-Approval Queue' (highlighted in blue), 'Recently Viewed', 'Expense Approval Queue', 'Expense Pre-Approval Queue' (highlighted in blue), 'Expense Pre-Approvals', 'Expense Reimbursements', 'My Reimbursements', and 'My Reimbursements Not Submitted'. To the right of the dropdown menu, there is a search bar with the text 'Search this list...' and a settings icon. Below the search bar, there is a table header with columns: 'Record...', 'Reimb...', 'Status', 'Reimb...', and 'Reimb...'.

# ■ 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.