

# VP09.02 - Submit a Flat-Rate Reimbursement Request

## Overview

Each program year, Tax-Aide volunteers may elect to receive a one-time, flat-rate expense reimbursement for which non-leader volunteers receive \$50, and volunteer leaders receive \$80. No other reimbursement is permitted for the season if a flat-rate reimbursement is requested. For reimbursements, the program year runs from October 1 to September 30. Flat rate reimbursements can also be requested via mass approval form submitted by a volunteer's supervisor. For more information on the mass approval process, refer to **VP09 - Complete and Submit A Flat-Rate Mass Approval Form**.

## How to Request a Flat-Rate Reimbursement



1. Click the **Manage Reimbursements** tab on the red menu bar.
2. Click the **New Reimbursement** button.



3. Click **Classic Form**.

A screenshot of a selection screen with a red header. Below the header are two grey buttons: 'Classic Form' with a document icon and 'Wizard' with a laptop icon. A red arrow points to the 'Classic Form' button. A 'Cancel' button is in the bottom right corner.

Select a Method to Create your Expense Reimbursement

 <b>Classic Form</b> Use the classic form to create a reimbursement.	 <b>Wizard</b> Use the wizard to guide you in creating a reimbursement.
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Cancel

4. Click on the **Assignment ID** that corresponds to the position for which you are submitting the reimbursement request. Note: If you hold a leadership position, be sure to click on its associated **Assignment ID** to receive the \$80 leadership flat rate reimbursement.

A screenshot of a table with two columns: 'ASSIGNMENT ID' and 'POSITION NAME'. Two rows are visible, both with 'AS00' in the first column and 'TA-R05-O' in the second. A red arrow points to the first 'AS00' entry.

ASSIGNMENT ID	POSITION NAME
AS00 [redacted]	TA-R05-O [redacted]
AS00 [redacted]	TA-R05-O [redacted]

5. In the **Expense Details** section, select **Flat Rate** from the **Reimbursement Type** drop-down menu. The **Funding Code** field will populate, and a line item will be added in the **Line Items**.
6. Review the reimbursement for accuracy.
7. Click **Submit for Approval** at top right, then check the box in the **Verify and Submit Reimbursement** section. Click **Certify**.
8. You will receive an email when your supervisor approves the request. You will then receive a check or a direct deposit depending on the choice you have made on your Contact Record.