

# 9 – Complete and Submit a Flat Rate Mass Approval Form



## Overview

Volunteer leaders who hold a supervisory position (Local Coordinator (LC), District Coordinator (DC), State Coordinator (SC), Regional Coordinator (RC)) may enter and approve flat-rate reimbursement requests in the Portal for their direct reports using the **Mass Approval Form**. This process allows volunteer leaders to request flat-rate reimbursements for those volunteers who do not wish to enter reimbursements themselves.

## Print the Mass Approval Form

A volunteer leader must print the mass approval form and ask if the volunteers listed on the form would like to receive a flat-rate reimbursement. If they do, each volunteer must sign the form for the *highest position he/she holds* as well as confirm that their mailing address is correct.

1. Navigate to your **Contact** record.
2. In the **Volunteer Assignments** section on the right, click **View All**. Then click on the **Assignment ID** of your supervisory position (LC, DC, SC, or RC).

VOLUNTEER ASSIGNMENT: ASSIGNMENT ID	IS ACTIVE ↓	POSITION
AS00019347	<input checked="" type="checkbox"/>	TA-R08-TX3-D05-S58055101 Counselor
AS00019348	<input checked="" type="checkbox"/>	TA-R08-TX3-D05-S58055101 Local Coordinator

3. Click on the drop-down arrow to the right of **New Pre-Approval**.
4. Select **Approval Form**.
5. Open and print the PDF file, *Flat Rate Reimbursement Request Form*.

## Submit the Mass Approval Form

After all signatures are obtained, the volunteer leader can submit the reimbursement requests on behalf of his/her direct reports who signed the mass approval form. There will be one entry for each *active position* a volunteer holds.


1. Navigate to your **Contact** record.
2. In the **Volunteer Assignments** section on the right, click **View All**. Then click on the **Assignment ID** of your supervisory position (LC, DC, SC, or RC).

3. Click on the drop-down arrow to the right of **New Pre-Approval**.
4. Select **Mass Approval**.
5. Select a status for each volunteer's *highest-level position*, placing the remaining positions in the status of *Electing No Reimbursement*.
  - *Approve Now* is used for a volunteer who requests a flat-rate reimbursement and has a current address within the Portal.
  - *Electing No Reimbursement* is for a volunteer who chooses not to receive reimbursement or who has already submitted a flat rate request. This is an informational status that can be changed to another status at any time.
  - *Place on Hold* is for a volunteer who needs to correct his/her addresses within the Portal.
6. Click the **Submit** button once you have selected the appropriate reimbursement action for each active position entry.
7. Refresh your page once you receive a message that the form was successfully submitted.

Note: The names of those volunteers who you approved will move to the bottom of the screen in the **Reimbursement Already Submitted or Approved** section.

### Reimbursement Returns an Error

The system will display an error message at the top of the page and a caution icon next to the reimbursement(s) not submitted due to an error. Hovering over the caution icon will produce an explanation of the issue encountered so that volunteer leaders know what action to take for resolution.

1. Set the action to *Place on Hold* for reimbursements with a caution icon.
2. Click **Submit**.
3. Resolve the error using the explanation from the message that appears when you hover over the caution icon. 
4. Return to the mass approval form and update the reimbursement status for which you resolved the error to an *Approve Now* status.
5. Click **Submit**.
6. Refresh your page once you receive a message that the form was successfully submitted.

Note: The names of those volunteers who you approved will move to the bottom of the screen in the **Reimbursement Already Submitted or Approved** section.