
Expense Report Instructions | 2023-24

PROCEDURE FOR PAYMENT AND REIMBURSEMENT REQUESTS

- › This form is to be completed for ALL expenses
 - › All lines must be completed in order for the request to be processed
 - › If you are unsure of whether an expense is allowable, ask your committee chair or board member **BEFORE** you make the purchase
 - › Incomplete requests will be returned to the person submitting the request, further delaying payment
 - › Reimbursement requests submitted without prior completion of this form **may not be approved**
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STEP 1: EXPENSE REQUEST

This section is to be filled out by the person submitting the request and should be completed and made into a PDF file prior to submitting your expense for approval.

- › **Description of Expense:** description of item purchased or expensed, including the date (year-month) and event/activity name (e.g., 2022-10 Client Roundtable, Food and Beverage)
- › **Annual Budget Amount:** indicate the amount budgeted for the specific line item or expense
- › **Expense Amount:** indicate the actual amount of the expense
- › **Receipts:** paste receipts into this document (do not send separately)
- › **Save PDF file as:** Last_First_Event_2022-XX-XX (Example: Dinin_Melinda_March Membership Mixer_2023-03-15)

STEP 2: EXPENSE APPROVAL

- › Send your completed expense report PDF to the Chapter President Hillary Boden (hboden@markthomas.com), Treasurer (Andrea Weathington Andrea.Weathington@stantec.com), and your committee chair for approval of the expense

STEP 3: CHECK OR REIMBURSEMENT REQUEST

- › Complete this section by filling in who the check should be made payable, the dollar amount of the check, and the mailing address
- › Form must be received by the 15th of the month in order to be processed that month; all requests received after the 15th will be processed the following month
- › All reimbursements will be sent via BillHighway (similar to a bank check)





INCLUDE RECEIPTS HERE
DO NOT SEND AS SEPARATE ATTACHMENTS