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HR Toolkits for Small Business

About the Form

name	**AD-PBL-4550-M. Expense Report Form**
owner	Finance
access & use	All Staff
what it is	Form used to submit a request for reimbursement for work-related expenses
who uses it	Staff members wishing to be reimbursed for expenses

Working with the Form

The blue-shaded cells in the **Total** column contain formulas that will automate expense calculations. Do not enter data into these cells.

Instructions

1. Save a copy of the *Expense Report Form*.
2. Add your expense information to the form:
    a. To find the appropriate code for each expense, refer to the **Drop-down List Ranges** worksheet tab.
    b. Once you have entered values in the **Amount** column and the **Exchange Rate** column (if applicable), values in the **Total** column are automatically calculated.
    c. If you have added rows or widened columns, you may have to modify the form for printing.
3. Print the completed form, and then sign and date it.
4. Send the signed form to CUSTOMIZER: your manager for approval.
5. Send the approved form to CUSTOMIZER: Example - Finance for processing.

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Document Owner: Finance

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