# How to Approve Reimbursement Requests

All volunteers will have access to Works to submit an out-of-pocket Reimbursement Request. Your approval signals your authorization that a check or ACH deposit be drawn against your team funds and paid to the volunteer submitting the request. Like the approval of credit card transactions, proper oversight of these reimbursement requests ensures that Team funds are used appropriately. The role of an approver is critical and will only be granted to those individuals on your Teams in leadership positions (i.e., Chair and/or Treasurer).

As an approver, you will be responsible to ensure: (1) the volunteer submitting the request is authorized to spend Team funds, (2) the nature and amount of the transaction are in line with your Team's activities, (2) the cost allocation codes are accurate, and (3) receipts are attached and complete.

## Specific Procedures are as follows:

1. Log in to Works and view your pending tasks under the Action Items section. This will tell you the number of Reimbursement Requests there are to review. Click the link under the Current Status column to be routed directly to the transactions.

2. Review each item by clicking on the Document Number and then on View Full Details. There you will see the items to review – the nature of the expense, the codes assigned by the volunteer and the uploaded receipt. You should be looking for legible & correct receipts, correct codes and comments that explain the purpose of the expense.  A Missing Receipt form should be uploaded if a volunteer has no receipt.

   a. TIP – It is easier to click on the file name of the receipt to view it in a new window rather to click the View PDF button which will take longer to open.

3. If there are any issues with the coding, the receipt or the validity of the expense, you should use the FLAG feature to send the request back to the user for fixing or clarification.
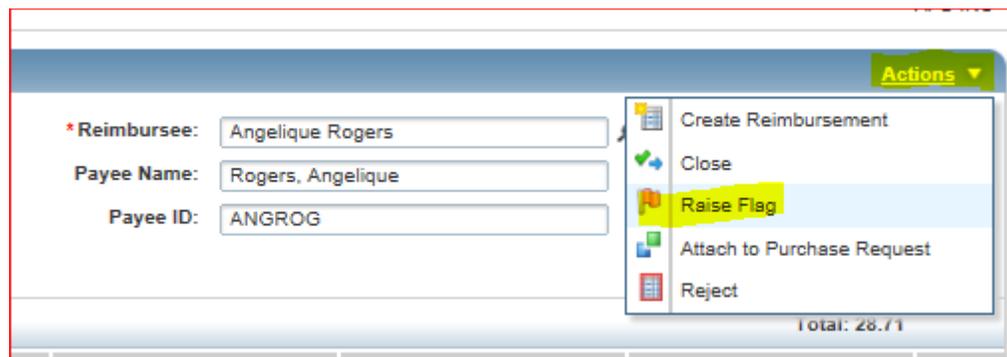


4. Once you Flag an item, the system will send the user an email alerting them to review their request. Since the email does not indicate the nature of the issues, as approver, you should contact the volunteer to correct the specific problem. Once the issue is fixed, the volunteer should unflag the transaction. This will generate an email to you informing you that you can now go back in to Works to review and approve the reimbursement request.