


Instructions for Submitting Cell phone/ Internet Reimbursement

**** To get to Expense Reports, go to Paylocity. Click on HR/Payroll and select “Expense”**

Step 1:

CITADEL SERVICING CORPORATION [11242] 

Expense Expense Reports Expense Settings Configuration Reports & Analytics Help

Expense Reports
0


Expenses
1

Receipt Gallery
0

Expense Reports to Approve
0


Expense Reports In Progress All

Create New Expense Report

| Status | Date Submitted | Date Approved | Details | Submitted By | Amount | Actions |
|--|----------------|---------------|---------|--------------|--------|---------|
|  You have not yet created an expense report | | | | | | |

Click Here
“Create New
Expense
Report”

Step 2: Fill in the Report Title as Phone and Internet Reimbursement; Business Purpose is monthly reimbursement – list the month. Then click the “+ Create Expense”.

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Create Expense Report

Save and Close Submit for Approval

Report Title (required) ⓘ
Phone and Internet Reimbursement

Business Purpose (required)
Monthly reimbursement - March 2021


Event ⓘ
▼

Department
<Default> ▼

Delete Expense Report

0 Expenses \$0.00
Reimbursable \$0.00

+ Create Expense + Select Saved Expense

| Date | Status | Merchant | Itemized | Amount | Delete |
|--|--------|----------|----------|--------|--------|
|  You have not yet created an expense | | | | | |

Comments ⓘ

+ Add Comment

Click Here
“Create
Expense”

Step 3: You will create 2 separate Expenses. One for Cell Phone and One for the Internet. Fill in all required fields.
***Make sure you select 'Credit Card (Personal) (Reimbursable)' for Payment Method.**

For Receipts, click on "Upload from Computer". Once you have submitted this, your uploaded receipts will save in the Gallery and you can use it for next month by clicking on "Select from Gallery". Then click "Save".

Create New Expense

[Close](#)[Save](#)

Details

Merchant (required)

Internet Reimbursement

Transaction Date (required) ⓘ

3/1/2021

Payment Method (required)

Credit Card (Personal) (reimbursable) ▼

Category (required) ⓘ

Internet ▼

Amount (required)

\$25.00

Notes (required) ⓘ

Monthly internet reimbursement

Override Cost Center ⓘ

No

Yes

Itemize? ⓘ

No

Yes

Receipts ⓘ

+ Drop files here to upload, or

Upload from Computer

Select from Gallery

You can upload up to 20 receipts at a time (up to 20MB total)



Step 4: It will return you to this page. Click on the “+ Create Expense” to submit for your cell phone reimbursement.

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Expense Expense Reports Expense Settings Configuration Reports & Analytics Help

< Edit Expense Report

Report Title (required)
Phone and Internet Reimbursement

Business Purpose (required)
Monthly reimbursement - March 2021

Event
▼

Department
<Default> ▼

Delete Expense Report

1 Expense

\$25.00
Reimbursable \$25.00

[+ Create Expense](#) [+ Select Saved Expense](#)

| Date | Status | Merchant | Itemized | Amount | Delete |
|-----------|--------|----------------------------------|----------|---------|--------|
| 03/1/2021 | ✓ | Internet Reimbursement, Internet | No | \$25.00 | × |

Comments

[+ Add Comment](#)

Save and Close

Submit for Approval

Step 5: You will enter in all the same fields that you did for the Internet reimbursement. Then click, “Save”.

See below.

Create New Expense

Close Save

Details

Merchant (required)
Cell Phone Reimbursement

Transaction Date (required)
3/1/2021

Payment Method (required)
Credit Card (Personal) (reimbursable) ▼

Category (required)
Cellular ▼

Amount (required)
\$25.00

Notes (required)
Monthly Reimbursement - March 2021

Override Cost Center
No Yes

Itemize?
No Yes

Receipts

+ Drop files here to upload, or

Upload from Computer Select from Gallery

You can upload up to 20 receipts at a time (up to 20MB total)

verizon

Account: 12345678901234567890

Service: Verizon Wireless

Plan: My Plan

Usage: 1000 MB

Charges: \$174.36

Payment: \$0.00

Your October bill is \$174.36

Pay by 10/15/21 to avoid late fees.

Go to myverizon.com to pay your bill.

Good to know

Check your bill for details.

For more information, visit myverizon.com.

Step 6: It will return you to the Expense Report Page. You can now click on “Submit for Approval” and it will route to your manager to be reviewed for approval. Once your manager approves, it will route to Accounting for payment. You will receive the reimbursement on the next payroll check.

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paylocity

Expense

Expense ReportsExpense SettingsConfigurationReports & AnalyticsHelp

Manage Credit Cards

< Edit Expense Report

Save and Close

Submit for Approval

Report Title (required) ⓘ

Phone and Internet Reimbursement

Business Purpose (required)

Monthly reimbursement - March 2021

Event ⓘ

Department

<Default>

Delete Expense Report

2 Expenses

\$50.00

Reimbursable \$50.00

+ Create Expense

+ Select Saved Expense

| Date | Status | Merchant | Itemized | Amount | Delete |
|-----------|--------|------------------------------------|----------|---------|--------|
| 03/1/2021 | ✓ | Cell Phone Reimbursement, Cellular | No | \$25.00 | × |
| 03/1/2021 | ✓ | Internet Reimbursement, Internet | No | \$25.00 | × |

Comments ⓘ

+ Add Comment