During a recent audit, I found that when members submit an expense, an additional PDF file called “Payment Request” gets automatically created, and added to the expense. However, when I submit expenses on behalf of other people, this form does NOT get created. The auditor, Dale Porter, asked for me to create some payment request forms for two expenses. This meant I just needed to follow the pattern on existing examples, Do an ‘adjust expense’, then drop the pdf next to the existing receipts. The file, “How to Deal with the Payment Request Form-PaymentRequestTemplate.odt” also included in this folder, is a LibreOffice report I put together if we do end up needing to add this additional form.

I just got off the phone with SLC, and they mentioned that the auditors likely shouldn’t have expected this form; so for now, I’ll go submit the remaining expenses and not bother with this form. Jacob, the support person I worked with mentioned he’d chat with the auditors on his side, and see if we actually need this pdf or not and let me know by the end of the week (today is 8/22/2022 4:01:01 PM)