

Using Bill.Pay for Reimbursements

Guidance for Committee Chairs





Santa Barbara
Newcomers Club

Introduction

SBNC has moved to Bill.com – Expense and Spend for submitting and processing reimbursements. This system ensures faster approvals, greater security, and direct deposit payments. If you've never used an online expense system before, don't worry—this guide will walk you through everything step by step.



Santa Barbara
Newcomers Club

How to Register and Log In for the First Time

1. Request Access: Email expense@sbnewcomers.org with your name and email address.
2. Receive a Registration Email: Within 24-48 hours, you will receive an email invitation from Bill.com with a registration link (valid for 48 hours).
3. Set Up Your Account:
 - Click the registration link right away.
 - Create a password.
 - Enter your birthdate (required for identity verification).



Santa Barbara
Newcomers Club

Reimbursement Process

Once you register and submit expenses the reimbursement process is to manually send a check to the address on file in Wild Apricot.

Please confirm in your personal sign-on that the address you want checks sent to is current. If you have recently made a change or need the check sent to a different address email: treasurer@sbnewcomers.org to confirm.

(NOTE: When we initially rolled out the system in February 2025 we tried to use ACH transfers but this feature is not available at this time. No bank details can be added into your bill.com account at this time.)



Santa Barbara
Newcomers Club

How to Submit an Expense

Log in to [Bill.com](https://login.us.bill.com/neo/login) using the email address you registered with and the password you set.

- You can enter expense reimbursements from the website using a browser:

<https://login.us.bill.com/neo/login>

- Or you can use the web app (Apple and Google)

<https://www.bill.com/product/download>



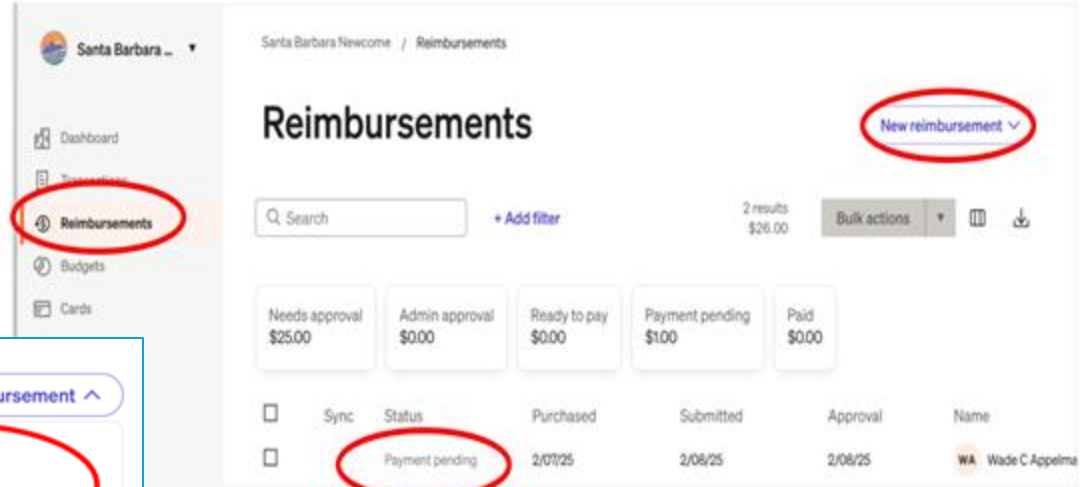
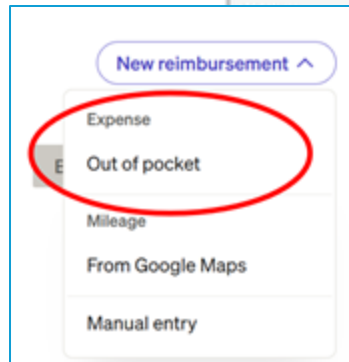
Santa Barbara
Newcomers Club

How to Submit an Expense

Click 'Reimbursements' in the left-hand menu. You can also return to this screen to check the Status of previously submitted reimbursement requests.

Click 'New Reimbursement' in the upper right corner.

Choose 'Expense: Out of Pocket' as the reimbursement type.





Santa Barbara
Newcomers Club

How to Submit an Expense

Fill in the following details:

- **Merchant:** Enter the vendor/store name (e.g., Costco, Trader Joe's). You can enter multiple vendors on a line.
- **Reimbursement Amount:** Enter the total amount of all receipts.
- **Transaction Date:** Select a date from one of the receipts.
- **Budget:** Select 'Member Reimbursement' from the dropdown menu.
- **Business Purpose:** Briefly describe the event.
- **Receipts:** Click + button to attach receipt images.
- **Committee Name:** Select the relevant committee.
- **Event Date & Name:** Enter the event details and click + **Create New Value** to save them.



Santa Barbara
Newcomers Club

How to Submit an Expense

New reimbursement

Out of pocket

Details

Merchant*

Reimbursement amount*

Transaction date*

Required fields

Budget*

Business purpose*

Receipts*



Required for Member Reimbursement (3)

* Committee Name

Name of committee sponsoring the event

* Event Date

Date the event was held - (Ex: Jan 10, 2020) (Then press + Create New Value below)

* Event Name

Enter Name of the event - (Ex: 80's Dance Party) (Then press + Create New Value below)

When all required fields are completed, the 'Request' button turns blue. Click 'Request' to send your reimbursement request.

Reimbursement total: \$0.00

Funds will be deposited to bank account ~ 10-15 [Business Days](#)
Once approved, this can take 5-8 business days





Santa Barbara
Newcomers Club

Frequently Asked Questions

Q: Once submitted how long will it take to receive my reimbursement?

A: Once approved by the Treasurer (1-2 days), then the check will be cut and sent to your address on file (in the Wild Apricot App). You can check the status of the reimbursement from the website as noted above.

Q: Do Committee Chairs Have to Submit Expenses for Others?

A: No. Each committee member must submit their own expenses.

Q: How Can I Track My Committee's Event Expenses?

A: Committee members should share their expenses offline for tracking. The Treasurer can provide a report upon request.

Q: I see that a credit card can be requested, can I get one?

A: No. This is not a feature that we are enabling.



Santa Barbara
Newcomers Club

Frequently Asked Questions

Q: Can I get an auto deposit ACH?

A: Unfortunately, not at this time. We are working to restore this feature.

Q: Why did SBNC Switch to Bill.com?

A: The old process was slow and prone to errors. Bill.com automates approvals and integrates with accounting, making it more secure and efficient.

Q: Can I request a check to be sent to a vendor in advance of an event?

A: Yes, this is outside of the expense reimbursement system. Send an email to treasurer@sbnewcomers.org and work directly to arrange payments. A direct payment to a vendor requires a member getting a W9 from the merchant. You should allow 2-3 weeks for payments to be made.



Santa Barbara
Newcomers Club

Quick Summary

1. **Register & Log In** – Request access via expense@sbnewcomers.org, then log in.
2. **Submit an Expense** – Fill out the reimbursement form and attach receipts.
3. **Approval & Payment** – The Treasurer reviews and approves within 24-48 hours.
4. **Receive Reimbursement** – Funds are sent via check to your address in 3-5 business days.

For help, email expense@sbnewcomers.org

or contact the Treasurer at treasurer@sbnewcomers.org



Reimbursements



- Any member can submit a request for event reimbursement
- No more FAR ... no longer a chair responsibility to submit for entire committee
- First Time Only to access the “Bill.com Expense and Spend System”:
 - Request access by mailing: expense@sbnewcomers.org
 - Name & email address is all that is required
 - Within 24 hours you will get a system email to set a password
 - Once logged on you will be prompted to enter the following: (this is information is encrypted by the site and not accessible by our club.. This is only done at sign-up)
 - Birthdate (this is mandatory by law)
 - Bank information (as your will get your reimbursement as a direct deposit)
- To see your account or request reimbursement
 - Login to website or on phone
 - Track payments and submit expenses



Santa Barbara
Newcomers Club

To Request Reimbursement (Browser Option)



- Login to site:
<https://app.divvy.co/login>
 - Email address and password you set @ signup
- Phone App:
 - Search for "bill spend and expense"

	Sync	Status	Purchased	Submitted	Approval	Name	Merchant/Message	Amount	Pay method	Budget	Bill
<input type="checkbox"/>		Awaiting approval	1/10/25	1/10/25		Walter C. Applegate	Test 1	\$79.50		Member Reimbursement Spring 2025 - Committee...	Test
<input type="checkbox"/>		Awaiting approval	1/14/25	1/15/25		Walter C. Applegate	Wine.com	\$2487		Member Reimbursement Spring 2025 - Committee...	Test
<input type="checkbox"/>		Awaiting approval	1/16/25	1/16/25		Walter C. Applegate	Test Event	\$6.00		Member Reimbursement Spring 2025 - Committee...	Test
<input type="checkbox"/>		Awaiting approval	1/16/25	1/16/25		Walter C. Applegate	TEST	\$100		Reimbursement	Test
<input type="checkbox"/>		Awaiting approval	1/16/25	1/16/25		Walter C. Applegate	CVS	\$600		Test - Spring 2025 - Committee...	Test
<input type="checkbox"/>		Awaiting approval	1/16/25	1/16/25		Walter C. Applegate	Test	\$1407		Test - Spring 2025 - Committee...	Test



Reimbursement Screen

- Combine all of your receipts for one event on a single submission
- **Merchant:**
 - Can be all on one line (CVS, Costco, Total Wines)
- **Reimbursement amount:**
 - Total of all your receipts for that event
- **Transaction Date:**
 - Date of your event
- **Budget:**
 - Select "Member Reimbursement"
- **Business Purpose:**
 - Description of items purchased ("wine for Presidents party & cheese board")
- **Receipts**
 - Add all receipts which show total amount from all vendors
- **Committee Name:**
 - Select the committee the event is sponsored by
- **Event Date:**
 - Date of your event
- **Event Name:**
 - What was the event called

New reimbursement

Out of pocket

Details

Merchant*

Enter merchant name

Reimbursement amount*

\$0.00

Transaction date*

Enter transaction date

Don't forget to add
mandatory receipts

Required fields

Budget*

Member Reimbursement

Business purpose*

Include a receipt for this purpose

Receipt*

+

Required for Member Reimbursement (C)

* Committee Name

Q Select...

Name of the Committee

* Event Date

Q Select...

Date the event was held - (i.e. Sat 10, 2023) (Please enter a Calendar Date (MM/DD/YYYY))

* Event Name

Q Select...

Event Name of the event - (i.e. 10th Annual Pottery Throw party) (Please enter a Calendar Date (MM/DD/YYYY))

Reimbursement total: \$0.00

Funds will be deposited to bank account within 10 business days

Submit





Santa Barbara
Newcomers Club

Phone App

- Search on App Store for “Bill Spend & Expense”
- Login (after getting your password)
- Submit by taking a picture of your receipt





A Few Reminders



- Setup your access ASAP if you expect to have expenses
- Download the phone app as option
- Let others on your committee know to setup an account too if they will have expenses this term
- You will see something about credit cards. This is DISABLED
- Once approved, transfers will occur in 24-48 hours. Check your dashboard for status
- Questions: email expense@sbnewcomers.org