



# *Using Bill.Pay for Reimbursements*

Guidance for Committee Chairs



## 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.



## How to Register and Log In for the First Time

1. Request Access: Email [expense@sbnewcomers.org](mailto: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).



## 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](mailto: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.)



## How to Submit an Expense

Log in to Bill.com 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.

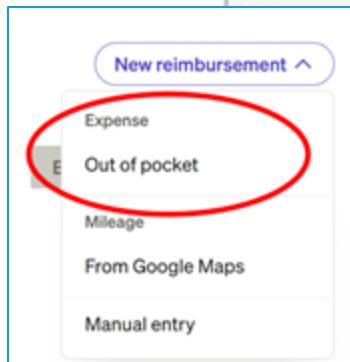
Click 'New Reimbursement' in the upper right corner.

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

The screenshot shows the 'Reimbursements' page. At the top right, there is a red circle around the 'New reimbursement' button. Below it, a table displays five categories: 'Needs approval \$25.00', 'Admin approval \$0.00', 'Ready to pay \$0.00', 'Payment pending \$1.00', and 'Paid \$0.00'. A search bar and filter options are at the top left. The main table has columns for Sync, Status, Purchased, Submitted, Approval, and Name. One row in the table is circled in red, showing 'Payment pending' under the 'Status' column.

Needs approval	Admin approval	Ready to pay	Payment pending	Paid
\$25.00	\$0.00	\$0.00	\$1.00	\$0.00

Sync	Status	Purchased	Submitted	Approval	Name
<input type="checkbox"/>	Payment pending	2/07/25	2/08/25	2/08/25	WA Wade C Appelma





## 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.



## How to Submit an Expense

### New reimbursement

Out of pocket

Details

Merchant\*

Reimbursement amount\*

 \$0.00

Transaction date\*

 Date of transaction 

Required fields

Budget\*

 Member Reimbursement 

Business purpose\*

 Include a reason for this request

Receipts\*



Required for Member Reimbursement (3)\*

\* Committee Name

 Select... 

Name of committee sponsoring the event

\* Event Date

 Select... 

Date the event was held - (i.e. Jan 10, 2005) (Then press + Create New Value button)

\* Event Name

 Select... 

Enter Name of the event - (i.e. BO's Dance Party) (Then press + Create New Value button)

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 → [Change](#)  
Once approved, this can take 5 - 8 business days





## 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 a not a feature that we are enabling.



## 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](mailto: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](mailto: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](mailto:expense@sbnewcomers.org)**

**or contact the Treasurer at [treasurer@sbnewcomers.org](mailto: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](mailto: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)



**bill** SPEND & EXPENSE

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

Santa Barbara Newcomers / Reimbursements

## Reimbursements

Search  + Add Star

8 results | \$101.24 Bulk actions

Newest approval	Oldest approval	Amount to pay	Payment pending	Net							
\$101.24	\$0.00	\$200	\$0.00	\$0.00							
<input type="checkbox"/>	<span>Sync</span>	Status	Purchased	Submitted	Approval	Name	Merchant/Venue	Amount	Pay method	Budget	Due
<input type="checkbox"/>	<span>Awaiting approval</span>	1/10/21	1/10/21	1/10/21	<span>Wait C Approval</span>	Ted T	Spotify	\$101.24	Bank	Members Reimbursement Spring 2021 - Committee...	Next
<input type="checkbox"/>	<span>Awaiting approval</span>	1/10/21	1/10/21	1/10/21	<span>Wait C Approval</span>	Wine.com	Wine.com	\$24.87	Bank	Members Reimbursement Spring 2021 - Committee...	Soon
<input type="checkbox"/>	<span>Awaiting approval</span>	1/10/21	1/10/21	1/10/21	<span>Wait C Approval</span>	Test Event	Test Event	\$100	Bank	Members Reimbursement Spring 2021 - Committee...	Asap
<input type="checkbox"/>	<span>Awaiting approval</span>	1/10/21	1/10/21	1/10/21	<span>Wait C Approval</span>	TEST	CVS	\$100	Bank	Reimbursed	After
<input type="checkbox"/>	<span>Awaiting approval</span>	1/10/21	1/10/21	1/10/21	<span>Wait C Approval</span>	CVS	CVS	\$100	Bank	Test - Spring 2020 - Periodic...	Prev.
<input type="checkbox"/>	<span>Awaiting approval</span>	1/10/21	1/10/21	1/10/21	<span>Wait C Approval</span>	00	00	\$101.24	Bank	Test - Spring 2020 - Periodic...	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\*

Reimbursement amount\*  
 \$0.00

Business purpose\*

Transaction date\*

Receipts\*

Reimbursement total: \$0.00  
Funds will be deposited to bank account within 48 hours  
Please approve this request before it is submitted.

Don't forget to add mandatory receipts

Required fields

Budget\*

Business purpose\*

Receipts\*

Required for Member Reimbursement Only

\* Committee Name:

\* Event Date:

\* Event Name:







Santa Barbara  
Newcomers Club

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

# Phone App

The BILL Spend & Expense App

Manage budgets, expenses, and more from the palm of your hand—all for free. Download from your favorite app store, or request a demo to see the full platform in action.

GET IT ON Google play Available on the App Store

A smartphone displays the BILL Spend & Expense app interface, showing a budget summary for "Gathering Michigan" with a balance of "\$1000.00". The app includes features like "Add Income", "Add Expenses", and a calendar view.





## 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](mailto:expense@sbnewcomers.org)