



SBNC Expense Reimbursement FAQ

February 28, 2025

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.

Getting Started with Bill.com

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).

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.)

Submitting an Expense Reimbursement

How to Submit an Expense

1. Log in to Bill.com
 - a. You can enter expense reimbursements from the website using a browser:
 - i. <https://login.us.bill.com/neo/login>
 - b. Or you can use the web app (Apple and Google)
 - i. <https://www.bill.com/product/download>
 - c. Login to either using the email address you registered with and the password you set

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

3. Click 'New Reimbursement' in the upper right corner.

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

The screenshot shows the 'Reimbursements' page for Santa Barbara Newcome. On the left, there's a sidebar with links: Dashboard, Transactions (circled), Reimbursements (circled), Budgets, Cards, and Help. The main area has a title 'Reimbursements' and a search bar. To the right is a summary section with five boxes: 'Needs approval \$25.00', 'Admin approval \$0.00', 'Ready to pay \$0.00', 'Payment pending \$1.00', and 'Paid \$0.00'. Below this is a table with columns: Sync, Status, Purchased, Submitted, Approval, and Name. A red circle highlights the 'New reimbursement' button in the top right corner. Another red circle highlights the 'Out of pocket' option in the dropdown menu.

5. 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.

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

New reimbursement

Out of pocket

Details

Merchant*
Enter merchant name

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
Q Select...
Name of committee sponsoring the event

* Event Date
Q Select...
Date the event was held - (e.g. Jan 10, 2025) (Then press + Create New Value below)

* Event Name
Q Select...
Enter Name of the event - (e.g. 80's Dance Party) (Then press + Create New Value below)

Request

Reimbursement total: \$0.00
Funds will be deposited to bank account ***. Click Change
Once approved, this can take 5 - 8 business days

Frequently Asked Questions

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

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.

Do Committee Chairs Have to Submit Expenses for Others?

No. Each committee member must submit their own expenses.

How Can I Track My Committee's Event Expenses?

Committee members should share their expenses offline for tracking. The [Treasurer](#) can provide a report upon request.

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

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

Can I get an auto deposit ACH?

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

Why did SBNC Switch to Bill.com?

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

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

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

Quick Summary

1. Register & Log In – Request access via expense@sbnewcomers.org, then log in.
3. Submit an Expense – Fill out the reimbursement form and attach receipts.
4. Approval & Payment – The Treasurer reviews and approves within 24-48 hours.
5. 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