

Online Expense Portal

QUICK REFERENCE GUIDE

CURRICULA EXPENSES

Payment Date: MM/DD/YYYY

Payment Method: Select Payment Method

Vendor / Facility:

Shipping and Handling: 0.00

Tax: 0.00

Payment Total: 0.00

Receipt File: Browse...

Curricula New

Supplemental Materials New

Back

Tip:
Each item of Curricula + Shipping & Handling + Tax + Supplemental Materials = Payment Total

1) Enter the total payment information of the purchase, as shown on the receipt:

- **Payment Date:** Select a date from the calendar, or type the date directly into the textbox
- **Payment Method:** How the card was used
- **Vendor/Facility:** Most likely where the curriculum was purchased
- **Shipping and Handling:** Leave this field blank if not applicable
- **Tax:** Leave this field blank if not applicable
- **Payment Total:** The total amount shown on the receipt
- **Receipt File:** Please note files cannot exceed 100MB and file names cannot include symbols (" \$ # < > /)

2) Click **New** next to Curricula to enter each item of curriculum (see [Page 2](#))

3) Click **New** next to Supplemental Materials to enter materials that are required or recommended by the curriculum (see [Page 3](#))

! If you are buying supplemental material for curricula purchased before the online expense portal, you must add the curricula to the database. To do this, click **New** next to Curricula and refer to [Page 2](#).

Notes: A new expense entry is required for each separate receipt

Content on this screen cannot be saved until at least one item of curricula is entered

CURRICULUM

The screenshot shows a form titled "CURRICULUM" with the following fields and options:

- 4** Points to the question: "Was this curriculum purchased in a prior year?" with radio buttons for "Yes" and "No" (selected).
- 5** Points to the "Subject" dropdown menu, which is currently set to "Select one".
- 6** Points to the "Save" button.

Two dropdown menus are shown on the right side of the form:

- The top dropdown menu is labeled "Select one" and lists: PS, KG, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, Other.
- The bottom dropdown menu is also labeled "Select one" and lists: Grammar, Mathematics, Reading, Science, Social Studies, Other.

- 4) If you are expensing curriculum that was purchased during **this quarter**, leave **No** selected and proceed to the next step.

If you are adding curriculum that was **previously purchased** using ESA funds (during a previous quarter or prior year), select **Yes** instead.

- Once curriculum is added to the database, it will not need to be added again in the future
- Amount and payment information will not be required

- 5) Enter the following information for each curriculum item listed on the receipt:

- **Title**
- **Publisher**
- **Subject**
 - If the Subject is not listed on the drop-down menu, or if the curriculum encompasses multiple subjects, scroll to the bottom and select **Other**
 - When **Other** is selected, an additional field is visible for specifying the subject(s)
- **Grade Level**
 - If the Grade Level encompasses multiple grades, scroll to the bottom and select **Other**
 - When **Other** is selected, an additional field is visible for specifying the range of grade levels
- **Amount** (the price of the item)

- 6) Click **Save** to save this information and return to the previous screen

Note: Repeat steps 4-6 for each item of curriculum shown on the receipt.

SUPPLEMENTAL MATERIAL

The screenshot shows a form titled "SUPPLEMENTAL MATERIAL" with the following fields and callouts:

- 7** points to the "Associated Curriculum" dropdown menu.
- 8** points to the "Description" and "Vendor / Publisher" text input fields.
- 9** points to the "Supporting Document File" field, which includes a "Browse..." button.
- 10** points to the "Amount" text input field, which currently displays "0.00".
- 11** points to the "Save" button at the bottom right of the form.

The form also includes a "Cancel" button next to the "Save" button.

- 7) Select the curriculum that requires the supplemental material from the drop-down menu
 - The dropdown menu is pre-populated with curriculum items previously entered in the expense portal
 - If the curriculum was purchased before the launch of the online expense portal, it must be added to the database, as explained on the [previous page](#)
- 8) Enter a **Description** (one or two words) of the item and the **Vendor/Publisher** of the item
- 9) Upload a picture or document that states the requirement or recommendation for this item, such a screenshot of the website or pictures of the packaging
- 10) Enter the **amount** of the item, as shown on the receipt
 - If entering curricula purchased during a previous year, this field is not visible
- 11) Click **Save** to save this information and return to the previous screen

Note: Repeat steps 7-11 for each item of supplemental material shown on the invoice.

SAVE THE EXPENSE REPORT

Payment Date

11/04/2016

Payment Method

Phone, Mail, Internet

Vendor / Facility

Curristore

Shipping and Handling

5.00

Tax

25.00

Payment Total

600.22

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Save

Cancel

Back

Manage Uploaded Receipt

File Name	Uploaded Date	View	Actions
receipt.png	11/4/2016 10:51:06 AM	View Receipt	Delete Receipt

Curricula New

Title	Publisher	Subject	Grade Level (of curriculum)	Payment Total		
Reading Rainbow	Reading Rainbow	Reading	3	153.00	Edit	Delete
Mr.Rogers Math Set	The Man	Mathematics	4	200.05	Edit	Delete
History Lesson Plan	Books and Stuff	Social Studies	1-5	199.00	Edit	Delete

Supplemental Materials New

Description	Vendor / Publisher	Associated Curriculum	Payment Total		
Calculator	Maker of Things		10.00	Edit	Delete
Calculator	The Man	Mr.Rogers Math Set	4.25	Edit	Delete

12) Click **Save** to save the expense entry and return to the Main Screen, where you can create additional expense entries, submit your expense report, or later modify this entry prior to submission.

Please be aware that expense reports cannot be changed after they are submitted.