Online Expense Portal

QUICK REFERENCE GUIDE

CURRICULA EXPENSES

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 <u>before</u> 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

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

7 Associated Curriculum	Select one ▼
8 Description	
Vendor / Publisher	
Supporting Document File	Browse... **9**
10 Amount	0.00
	11 💾 Save ✖ Cancel

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

12 [💾 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.