



Samford University

EXPENSE REIMBURSEMENT FORM

Dynamic Form Instructions

Expense reimbursement requests may be submitted in one of three formats:

DYNAMIC FORM*	Submit through Form Central or the Accounting & Financial Management website. *Preferred method of submission
PDF FILE	Editable PDF file can be submitted with physical or e-signatures to invoices@samford.edu with accompanying receipts.
EXCEL FILE	Excel file can be submitted with physical or e-signatures to invoices@samford.edu with accompanying receipts.

PDF/EXCEL SUBJECT LINE: Include a dollar sign (\$). Example: Name \$XXX, XX-XX – Name, \$XX

IMPORTANT INFORMATION

45-MINUTE TIME LIMIT	Each Dynamic Form has a 45-minute time limit. When the form times out, all information entered is deleted. Allow enough time to complete and submit the form.
FORM ACCESS	Non-active Samford and external users do not have access. Administrative staff may submit on behalf of faculty, but the faculty member must complete the final signing step. Do not route forms to an inactive user.
EMAIL NOTIFICATIONS	Required-action emails will come from notify@ngwebsolutions.com . Save this address as a contact so requests are not missed.
PAYMENT PROCESS	Once request has been processed, payment will be set to issue on the next direct deposit or check run. If the event has not yet occurred, then payment will be set to be issued on the run directly following. If further questions are needed, email correspondence will be initiated.
NON-VENDOR GUESTS	One-time guest reimbursement may be completed on the PDF or Excel method. Dynamic form method requires an SUID number to be included. If using a PDF/Excel method, the guest will need to sign the form showing their approval.

DYNAMIC FORM OVERVIEW

REQUEST SUBMITTED BY	Automatically captures the person completing the form. Information cannot be edited except for the optional phone number.
REIMBURSEMENT / BUDGET INFORMATION	The reimbursement method is based on payment status stored in Accounting & Financial Management. If direct deposit is selected, an email may be sent to complete setup if not active.
REIMBURSEMENT CHARGES	Mileage Only — for mileage expenses only. Complete Expense Worksheet — for other expense types and all available expense categories. Provide complete, accurate information to prevent delays.
ADDITIONAL COMMENTS / MEAL ATTENDEES	Use for the purpose of the expense, special circumstances, or other relevant information. Meal attendees may be entered here or listed on the receipt.
ATTACH RELATED EXPENSES	Combine all receipts and supporting documentation into one file . Missing or incomplete documentation may result in additional correspondence or processing delays.
SIGNATURE SECTION	The Immediate Budget Supervisor is the direct supervisor of the requester or the budget manager. If the requester is also the budget manager, the requester may be listed.

BEFORE YOU SUBMIT

1	VERIFY EMAIL ADDRESSES — Confirm all email addresses are accurate. An incorrect address may prevent the request from moving forward.
2	COMPLETE YOUR SIGNATURE STEP — Select "Click to Sign" and complete the information required for your role.
3	SUBMIT THE REQUEST — When complete, select "Submit Form" at the bottom of the form.

Questions? Contact **Bekah Chappell** at rchappell@samford.edu.