

American Repair Maintenance

Travel & Expense Training Guide

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Introduction

ARM has implemented a new process to collect expenses. These expenses include reimbursing mileage, company credit card transactions and reimbursement for expenses paid out-of-pocket. This process has many benefits for both ARM and our team. ARM will be able to process these expenses much more efficiently and better understand where funds are being spent. This helps us make better decisions and pass costs to the customer.

For you, this process helps to automate some of the manual steps you are doing today. Your mileage is recorded automatically as you drive from job to job. Receipts are entered directly into the Expensify app and routed to your supervisor for review. Finally, you will be reimbursed directly from ARM soon after your expense report is submitted. This process typically takes 1-2 business days after final report approval.

We need your support to make this transition successful.

- First, review the instructions below, including the training provided by Expensify. Let us know if there is something we have not covered or can make clearer.

- Second, pay attention to the details. As an example, having the work order in the description is important. Your supervisor will review your expense reports and will need to send them back if not completed. Help us reimburse you quickly by getting the report through approval quickly.
- Third, this is just one of the steps ARM is taking to improve our processes. We also recognize that not everything can happen at once. For now, you will still need to load receipts to mHelp and/or the customer app. We understand this is duplicate work and at some point in the future would like to eliminate this, but today we do not have that solution.

Training Videos and Documents

Before beginning your account set up, click on the below to watch the training videos.

[Mobile App Training Videos](#)

Note: There are 2 parts to the Mobile App Training Videos – be sure to click on each video on the right side of your screen to view both.

Additional Resources - Optional

If you are more of a visual learner or would like more training. You can sign up for a free Webinar training by clicking [HERE](#).

Setting Up Your Account

Important: Wait for your invitation email from ARM before setting up your account. It is important that you click the validation link sent to your work email before starting. If you did not receive an email, notify the Field Coordinator.

- Once you have your invitation, click the link to set up your account password.
- In your phone’s app store, locate and download the Expensify App. You can use the links below to locate the appropriate app:
 - [iOS](#)
 - [Android](#)
- Link your bank account for reimbursements
 - In the menu on the left, select “Settings”
 - Under Your Account click “Reimbursement”
 - Click on the Log into online bank account”
 - Click “Continue”
 - Select your bank
 - Follow the prompts to link your online bank account
- You are ready to use Expensify

Entering Expenses

Entering Mileage

Primary

At the start and end of each drive to a job site (or back home), open the Expensify App and track your mileage using the steps below. All mileage must be tracked using the GPS feature.

- Click on the “+” sign in the upper right-hand corner
- Select “Start GPS”
- Click “Start”
- Once you have arrived at your destination click “Stop”
- Click “Use”
- **Required:** In the Description Field, enter the work order number for the job you are traveling to
- Select the appropriate Tag
 - Mileage – Between Jobs: Use this tag when traveling from one job site to another
 - Mileage – Commute: Use this tag when driving to your first job site from your home OR when returning home from your last job site.
- Adjust for Commute Miles - you must manually deduct the 40-mile standard commute.
 - If the trip is less than 40 miles, adjust the “Total Distance” to zero.
 - If the trip is greater than 40 miles, deduct 40 miles from the distance of the trip and enter the remaining miles into the “Total Distance” field
 - Example – Drive to first job site is 65 miles (65-40=25). Enter 25 into the field
- Click “More Options”
- Select the Category “Mileage”
- **In the Reimbursable field, turn the reimbursement toggle “ON” (green)**

NOTE: The Expensify App will not be used for time tracking. All paid travel time must be tracked using the ARM timekeeping system.

Alternate

If you forget to start your GPS tracker prior to a trip, you can manually enter the miles using one of the two options below. This is a backup option and is not to be used as your primary method for tracking miles.

Enter mileage on your home computer (preferred option):

- Go to the [Expensify Website](#)
- Log in using your ARM email and the password you created
- On the left-hand side, click “Expenses”
- In the upper right-hand side, click “New Expense”
- Under Distance, click “Create from map”
- Enter the starting and ending addresses in their respective fields
- Click “Save”
- Enter the Description, Category and Tag using the steps listed in the Entering Mileage steps above
- Click “Save”

Enter mileage on your phone (only use if you do not have access to a PC):

- Go to [Google Maps](#) on your phone and enter the starting and ending addresses in their respective fields
- Take a screenshot of the map
 - The Distance must be visible in the screenshot
- Open the Expensify Mobile App
- Click on the “+” sign in the upper right-hand corner
- Under distance, select “Manually Create”

- Enter your Total Distance
- Click on the “+” sign to add your map screenshot
- Enter the Description, Category and Tag using the steps listed in the Entering Mileage steps above
- Click “Save”

NOTE: It is your responsibility to ensure that all mileage is tracked in Expensify. Any miles driven that are not entered into Expensify will not be paid.

Entering Company Card Expenses

Your ARM AMEX must be used for all expenses when reasonably possible. We understand some circumstances will require you to use cash or your personal card; these exceptions should be rare.

- Open the Expensify App
- Click the “+” sign in the upper right-hand corner
- Under Expense, select “Scan Receipt”
 - Receipts are required for all expenses
- Take a photo of the receipt
- The “SmartScan” feature will automatically begin reading the receipt.
 - This process may take time. You may want to come back to the app later to complete the details.
 - If you receive an electronic receipt, you can e-mail that receipt from your ARM e-mail to receipts@expensify.com. The next time you login to expensify, it will be ready for you to review details.
- Confirm that the details scanned are accurate – adjust if needed
- In the Description field, enter the Work Order number associated with the expense. If the expense is not for a specific work order, enter the customer name or the reason, such as Training, if not for a specific customer.
- In the Tag field, select “Non-Mileage”
- Click “More Options”
- In the Category field, select the appropriate category
 - **Flight:** Expenses associated with air travel
 - **Hotel:** Expenses associated with hotel stays
 - **Mileage:** Only used when tracking mileage
 - **Parking & Tolls:** Expenses paid for parking and tolls while driving to a work order
 - **Per Diem:** Used to track daily per diem for technicians with extended overnight travel. See the section “Entering Per Diem” below for more information.
 - **Billable Materials:** Material used to complete a work order. Typically, replacement parts purchased for a specific work order. Does not include Shop Supplies or Equipment & Tools.
 - **Equipment & Tools – under \$50:** Specialized equipment or tools needed to complete a work order, less than \$50
 - **Equipment & Tools – over \$50:** same as above, but greater than \$50
 - **Shop Supplies:** Consumable supplies not purchased for a work order but used often and kept on hand. Caulk, foam brushes and tape are examples.
- **IMPORTANT:** In the Reimbursable field, turn the reimbursement toggle “OFF” (white) for ALL COMPANY AMEX purchases
- Click “Save” in the upper right-hand corner

Entering Out-of-Pocket Expenses

As stated above, ARM recognizes that in rare instances, you may have to use your personal card or pay cash for business transactions. When this occurs, please enter the expenses for reimbursement using the steps listed in the “Entering Company Card” Expenses” section. **In the Reimbursable field, turn the reimbursement toggle “ON” (green)**

Entering Per Diem:

- Does not require a receipt.
- All meal expenses should be paid out of pocket and you will be reimbursed a flat rate.
- Enter a Per Diem expense at the end of each week you are traveling overnight
- In the App, click on the “+” sign in the upper right-hand corner
- Under Expense, select “Per Diem”
- Enter “Per Diem” in the Travel Destination Field
- Enter the dates and times you were traveling overnight that week
 - **Note: If your Trip includes days in 2 (or more) different pay periods, you should enter a separate Per Diem expense each week that covers only the dates in that pay period.**
- Enter your Rates using the steps below:
 - Click on the Rate Field and select “First or Last Day”
 - In the Quantity Field, enter the number of days you traveled to your destination from home and/or traveled back home. Typically, 2 assuming you left and returned the same week.
 - \$27.50 Per Diem is paid for the first and last day traveling
 - *Note: This is only used when traveling to/from your HOME. If you are traveling in between destinations on an extended trip, you will be paid the Full Day rate.*
 - Click “Add Another Rate” and select “Full Day”
 - In the Quantity Field, enter the number of full days you were traveling that week.
 - \$35.00 Per Diem is paid for each day in between arrival and departure
 - Example – If leaving town on Monday and returning home on Friday, you will be paid 2 days at the “First or Last Day” rate (\$27.50) and 3 days at the “Full Day” Rate (\$35.00). Your total Per Diem for the week will be \$160.00.
- In the Tag field, select “Non-Mileage”
- Click “More Options”
- In the Category Field select “COS: Per Diem” at the top
- In the description field, enter the reason for travel
 - Enter the Work Order number if traveling for a specific job/project
 - Training
 - Capacity (assist with high work volume)
- **In the Reimbursable field, turn the reimbursement toggle “ON” (green)**

Submitting Expense Reports

Once your expenses are entered, Expensify will automatically generate your expense report. If there are no violations, the report will auto submit to your supervisor for payroll approval on Sunday nights. Any

violations will come to your Expensify inbox and you will need to click “fix violation” and follow the prompts to resolve the issue. Log into your account at the end of each week to verify that no violations exist and/or resolve any outstanding issues.

You can manually submit a report earlier if you have significant reimbursable expenses. Complete the steps below to manually submit a report:

- Select “Reports” in the menu
- Click on the report you would like to submit
- Click “Submit Report” in the upper right-hand corner
- An email to the appropriate person will auto generate
- Click “Submit”

Expensify Employee Checklist

Once you have read and understand all steps outlined above, complete the checklist below.

- Initial next to each item
- Sign and date at the bottom
- Submit completed checklist to HR

_____ I have read and understand the Expensify Training Guide

_____ I have watched the Expensify training videos and read the Expensify training documents

_____ I have accepted the email invitation and set my password

_____ I have connected my personal bank account to be used for reimbursements

_____ I understand that I will only be reimbursed for expenses that are properly submitted in Expensify and have been approved

Employee Signature: _____

Date: _____