

Document No.: SOP-F1	<b>SHPE FINANCIAL REIMBURSEMENT - STANDARD OPERATING PROCEDURE</b>
Effective Date: June 1, 2025	
Revision Status: 00	<i>REIMBURSEMENT PROCESS FOR INDIVIDUALS AND CHAPTERS TO SUBMIT FOR REIMBURSEMENT FOR PRE-APPROVED EVENTS, ITEMS OR PRIZES.</i>
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No	Procedure / Task	Responsibility	Outcomes / Findings
1A	Set up Bill.com Account (if one isn't already created for the individual or chapter)	Individual or Chapter Representative	Fill out <u>W-9 form (linked here)</u> and submit to finance@shpe.org to set up Bill.com account
1B	Finance reviews and confirms valid form	SHPE Finance	Once form is approved, they will send an e-vite through Bill.com
2A	Submit reimbursement form to RVP for review and approval - amount should be pre-approved through regional outing form or based on prize amount	Individual or Chapter Representative	Fill out <u>Reimbursement Form (linked here)</u> and send to your RVP email RVP#@shpe.org for approval
2B	RVP reviews and confirms valid form then forwards to SHPE Finance for final review	RVP	Ensure to have all receipts attached
3	SHPE Finance reviews reimbursement form and submits for Invoice to be completed in Bill.com	SHPE Finance	Within Bill.com, it will show as an 'invoice' meaning a payment from SHPE to your account is pending
4	Depending on the financial cycle is when the payment will be finalized within Bill.com	SHPE Finance	From invoice in Bill.com to payment is 2-4 weeks, please plan accordingly
5	Confirm receipt of the requested funds prior to the end of the fiscal year (6/30)	Individual or Chapter Representative	After the fiscal year closes, there will be no more additional reimbursements as the books are closed.

1. All reimbursement requests require SHPE RVP and SHPE Finance approval to be reimbursed.
2. Regional budget is dispersed at the discretion of the RVP and the Regional leadership team - submitting requests for reimbursement that is not pre-approved may be denied.
3. Step 1A and 2A can be done concurrently to speed up the process.
4. Ensure to have all requested information, missing or invalid information will delay the reimbursement process.
5. For any questions, reach out to both [chapters@shpe.org](mailto:chapters@shpe.org) & [finance@shpe.org](mailto:finance@shpe.org)

