Recording Your Expenses Through the MBO Platform

Prepare Your Receipts

For each expense you're submitting for reimbursement, prepare a receipt as a digital file on your computer / device. Acceptable file types include .pdf, .jpg, .jpeg, .gif, and .png.

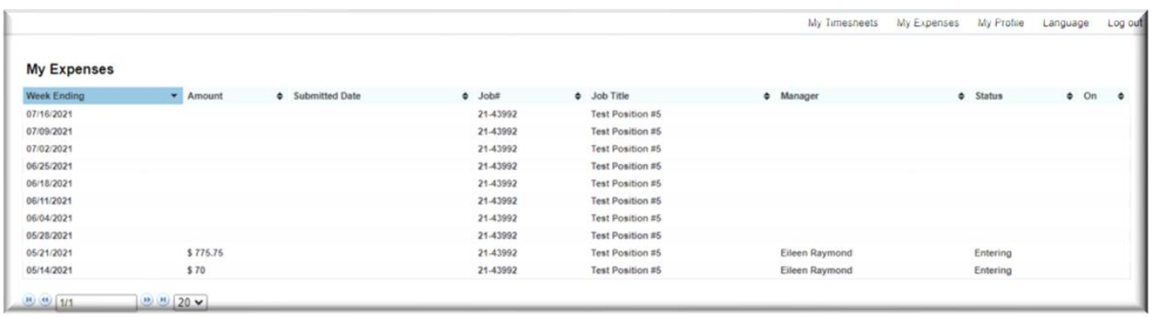
- **NOTE:** You may upload receipts individually (one per expense entry) or bundle multiple receipts into a single file before uploading.
- **NOTE:** Most MBO clients require receipts for most or all expenses. (Exceptions may include mileage reimbursement.) Please check with your client to confirm receipt requirements.

Log into the MBO Platform

Click here to access the [MBO Platform]() and use your MBO username and password to log in. Your MBO Platform dashboard appears.

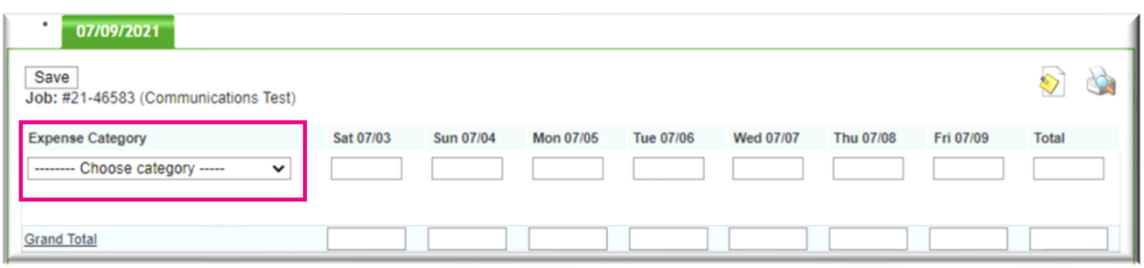
Submit Your Expenses

1. In the "Active Projects" area, find the appropriate project.
2. Hover over the three vertical dots on the right side of that project's panel, then click on "My Expenses." The **My Expenses** page appears with a list of weeks (listed in the "Week Ending" column).



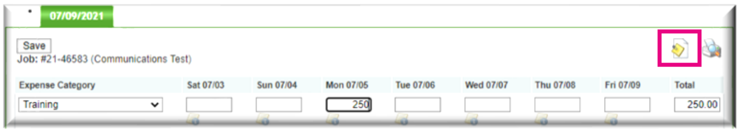
Week Ending	Amount	Submitted Date	Job#	Job Title	Manager	Status	On
07/16/2021			21-43992	Test Position #5			
07/09/2021			21-43992	Test Position #5			
07/02/2021			21-43992	Test Position #5			
06/25/2021			21-43992	Test Position #5			
06/18/2021			21-43992	Test Position #5			
06/11/2021			21-43992	Test Position #5			
06/04/2021			21-43992	Test Position #5			
05/28/2021			21-43992	Test Position #5			
05/21/2021	$ 775.75		21-43992	Test Position #5	Eileen Raymond	Entering	
05/14/2021	$ 70		21-43992	Test Position #5	Eileen Raymond	Entering	

3. Click on the row with the appropriate week ending date. The "Submit Expenses" form appears.
4. Select the appropriate category from the "Expense Category" dropdown box.

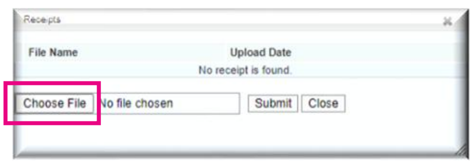


MBO partners by beeline

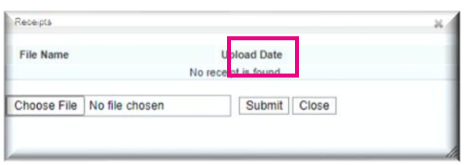
5. Enter the amount of the expense on the day you incurred the expense. For example, if you paid on Monday for a training course that took place Friday, enter the expense on Monday.
6. Repeat steps 4 and 5 for each expense.
7. Upload receipts for your week's expenses as required by your client. If you have an expense that spans multiple weeks, submit only the portion incurred in this week. As indicated above, you may upload receipts individually (one per expense entry) or bundle an entire week's worth of receipts into a single file before uploading.
    a. Click on the attachment icon near the top of the entry panel.



    b. In the **Receipts** pop-up, click on the "Choose File" button, then navigate to and select your file. The filename and upload date appear in their appropriate columns. You may only upload one file at a time.



    c. To upload additional receipts, repeat step 7.b above.
    When complete, click on the "Submit" button.

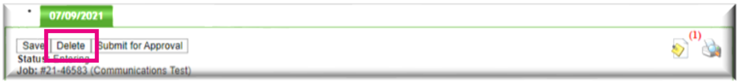


8. If you'd like to add a comment, enter it into the "Employee Comments" field at the bottom. Comments are visible to your manager with approval notification.

9. When you've completed your entries, click on the "Save" button.
    ▶ **NOTE:** Clicking "Save" saves your progress and updates the expense sheet status to "Entering." After you save, a "Submit for Approval" button appears.
10. Click on the "Submit for Approval" button to submit your entries. Your expense's status updates to "Pending Approval."

Additional Notes and Instructions

A. After you've saved your expenses for a week and see your refreshed expense list (step 10 above), a "Delete" button appears near the top of the entry panel. Use this to delete all your current entries for that week and start over.



B. You may also delete individual expense items before submitting them by clicking on the trashcan icon next to the expense.

C. Dates that are outside your project's period (i.e., before the start date or after the end date) are grayed out. You won't be able to enter expenses into these dates.

D. "Status" column labels and what they mean:
    a. <u>Entering</u>: You've saved that week's entries without submitting them.
    b. <u>Pending</u>: You've submitted that week's entries for approval.
    c. <u>Approved</u>: Your manager has approved your submissions for that week.
    d. <u>Rejected</u>: Your manager has rejected your submissions for that week. Please address this with your manager and adjust your submissions as necessary.