

# SOP: Expense Reporting Form Completion Instructions

This SOP provides detailed **expense reporting form completion instructions**, guiding employees through the accurate and timely submission of expense reports. It covers required documentation, proper categorization of expenses, approval workflows, and compliance with company policies to ensure expenses are reported consistently and reimbursed efficiently.

## 1. Purpose

To ensure all employees submit consistent, accurate, and timely expense reports in compliance with company policies and regulatory requirements.

## 2. Scope

This SOP applies to all employees submitting expense reports for business-related expenditures requiring reimbursement.

## 3. Responsibilities

- **Employees:** Complete and submit expense forms with supporting documentation.
- **Supervisors/Managers:** Review, approve or reject submitted expense reports.
- **Finance Department:** Audit, process, and reimburse approved expense reports.

## 4. Required Documentation

- Completed expense reporting form (paper or digital as specified by company).
- Original receipts, invoices, or proof of payment for all expenses.
- Travel itineraries or agendas (where applicable).
- Currency conversion documentation (for foreign expenses).

**Note:** Missing or illegible receipts may result in non-reimbursement.

## 5. Completion Instructions

1. **Access the Expense Report Form**  
Download or open the company's official expense report form from the employee portal or intranet.
2. **Enter Personal Information**  
Fill in your name, employee ID, department, and contact information.
3. **Report Each Expense Item**  
For each expense:
  - Date of the expense
  - Expense type/category (select from predefined options)
  - Detailed description or business purpose
  - Amount (specify currency if not local)
4. **Attach Required Documents**  
Attach all relevant receipts and supporting documentation as required.
5. **Review for Accuracy**  
Double-check all entries for correctness and compliance with policy.
6. **Sign and Date**  
Electronically sign or physically sign and date the completed form.
7. **Submit for Approval**  
Send the completed form and attachments to your supervisor or via the expense management system as instructed.

## 6. Expense Categories

Category	Examples
----------	----------

Travel	Airfare, hotel, car rental, taxi, mileage
Meals	Business meals, client dinners, per diem
Office Supplies	Stationery, printing, small equipment
Other	Any non-standard business expense (specify)

## 7. Approval Workflow

1. Employee submits completed expense report and documentation.
2. Supervisor/manager reviews and either approves or requests corrections.
3. Upon approval, report is sent to Finance for processing and reimbursement.
4. Finance audits and processes the reimbursement within the standard processing timeframe (e.g., 10 business days).

## 8. Compliance & Policy Adherence

- Ensure all expenses are business-related and comply with company policy.
- Submit reports within the required reporting period (e.g., within 30 days of incurring the expense).
- Do not claim personal or unallowable expenses.
- Repeated violations may result in disciplinary action.

## 9. Contacts

For questions or assistance, contact the Finance Department at [finance@company.com](mailto:finance@company.com).