

Reimbursement

- [Overview Video](#)

Overview Video

<https://www.youtube.com/embed/t5mFFzsyUdo>

Step-by-Step Tutorial Guide

Step 1: Open the Reimbursement Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, navigate to **Reimbursement**.
3. Click **Reimbursement** to open the module.
4. The Reimbursement dashboard displays all submitted reimbursement requests.

This module allows employees to submit reimbursement claims and enables HR or managers to review and process them.

Step 2: View Existing Reimbursement Requests

1. On the Reimbursement dashboard, review the list of reimbursement requests.
2. Each request displays details such as:
 - Employee Name
 - Reimbursement Type
 - Claim Amount
 - Submission Date
 - Status

3. Use the search or filter options to locate a specific reimbursement request.

This page provides a centralized view of all reimbursement claims.

Step 3: Create a New Reimbursement Request

1. Click **Add Reimbursement** or **Create Reimbursement**.
2. The reimbursement request form opens.
3. Begin entering the claim details.

This feature enables employees to submit reimbursement requests for eligible business expenses.

Step 4: Enter Reimbursement Details

1. Select the **Reimbursement Type**.
2. Enter the **Claim Amount**.
3. Select the **Expense Date**.
4. Enter a brief description or purpose of the expense.
5. Complete all mandatory fields.

Ensure the entered information accurately reflects the expense being claimed.

Step 5: Upload Supporting Documents

1. Navigate to the attachment section.
2. Click **Upload** or **Choose File**.
3. Select the supporting document from your computer.
4. Upload the file successfully.

Supporting documents may include:

- Bills
- Invoices
- Receipts
- Payment proofs
- Other supporting documents

Uploading valid proof helps verify the reimbursement claim.

Step 6: Submit the Reimbursement Request

1. Review all entered information.
2. Verify the uploaded supporting documents.
3. Click **Submit** or **Save**.
4. The reimbursement request is successfully submitted.

Once submitted, the request is forwarded through the configured approval workflow.

Step 7: Track Reimbursement Status

1. Return to the **Reimbursement** dashboard.
2. Locate the submitted reimbursement request.
3. Review the current status, such as:
 - Pending
 - Approved
 - Rejected
 - Paid (if applicable)
4. Open the request to view additional details or remarks.

This allows users to monitor the progress of their reimbursement claims.

Step 8: Review or Manage Reimbursement Requests

Authorized users can manage reimbursement requests by:

- Viewing claim details
- Reviewing attached documents
- Approving or rejecting requests
- Updating claim information (if permitted)
- Tracking reimbursement history

This helps HR and managers efficiently process employee reimbursement claims.

Key Benefits of the Reimbursement Module

- Centralized reimbursement management.
- Easy submission of employee expense claims.
- Upload supporting documents digitally.
- Streamlined approval workflow.
- Track reimbursement status in real time.
- Maintain complete reimbursement records.
- Reduce manual paperwork and processing time.

End of Tutorial

You have now completed the **Reimbursement Management** walkthrough in TankhaPay.

This module enables employees to submit reimbursement claims with supporting documents while allowing HR and managers to efficiently review, approve, and track reimbursement requests from a centralized platform.