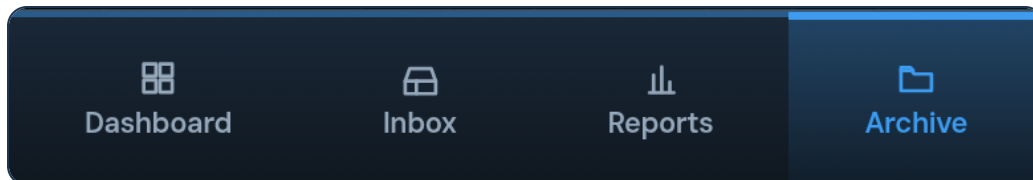
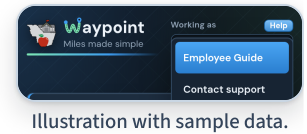


Waypoint is where Finance receives signed mileage reimbursements, marks them received, or denies them with a reason. At the top right, **Working as** switches your role: choose **Finance** and the tab bar below changes to match. The **Help** button opens the **Employee Guide** and **Contact support**.

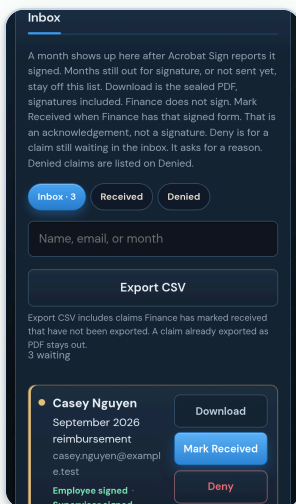


1 Dashboard



- Pick a **Fiscal year** (July 1 – June 30).
- The figures cover **everyone**: **Recent submissions**, **Miles claimed**, **Dollars by account number** and **By employee**.

2 Inbox

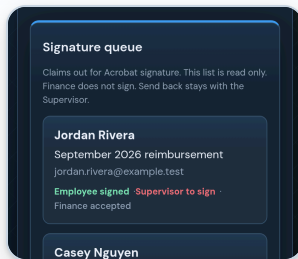


- A month arrives here after Acrobat Sign reports it signed. Use the chips **Inbox**, **Received** and **Denied**, or search by name, email, or month.
- **Download** gives the sealed signed PDF.
- **Mark Received** is an acknowledgement, not a signature. It moves the claim to Received.
- **Deny** asks for a required **Reason** (up to 500 characters). The claim leaves the Inbox, the month unlocks for the employee, and the employee is emailed your reason so they can fix the trips and send again.
- **Export CSV** covers received claims not yet exported.

Good to know: Finance does not sign.

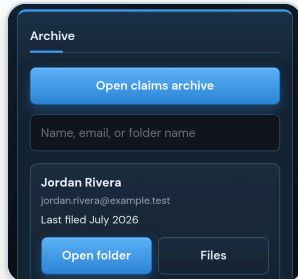
Email alerts: You get an email when a new fully signed reimbursement reaches your Finance inbox. It is on by default. To turn it off or back on, use the **Email notifications** switch on your **Profile** tab (switch **Working as** to **Employee** to see Profile).

3 Reports



- Read-only trips for any employee, with **Download PDF**, **Download CSV**, **Download Excel** and **Google Sheet**.
- The **Signature queue** is read-only for Finance. Only Supervisors sign or send back.

4 Archive



- All archive folders. **Open claims archive** opens the main claims folder.
- **Open folder** opens a person's folder; **Files** lists what is in it. Search by name, email, or folder name.

Need help? Contact support@ipsb.education.