


How to Submit Out-of-Pocket Expenses on Float

If you paid out of pocket for a work expense and need to get your money back, follow these steps to submit a reimbursement request through Float.

 [How to submit out-of-pocket expenses with Float Reimbursements](#)

What You'll Need

Before you start, make sure you have:

- ✓ A photo or PDF of your receipt
- ✓ A short description of what the expense was for

Step-by-Step Submission Guide

1. Log into Float

- Go to <https://app.floatcard.com/overview> and log in using your work email.
- If you don't have an account, ask your admin or manager to invite you.

2. Go to "Request Spend"

- From the left-hand menu, click on "Request Spend".
- Then click "Request Reimbursement".

3. Create Reimbursement Report

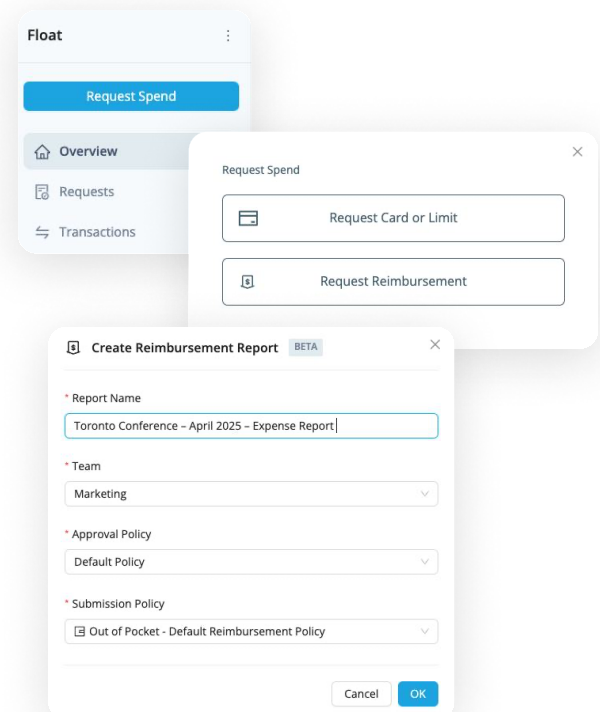
- **Report Name:** eg: Toronto Conference – April 2025 – Expense Report
- **Team:** eg: "Marketing" or "Sales".
- **Approval Policy:** Default or Custom Policy
- **Submission Policy:** Default or Custom Policy

Then click on "OK".

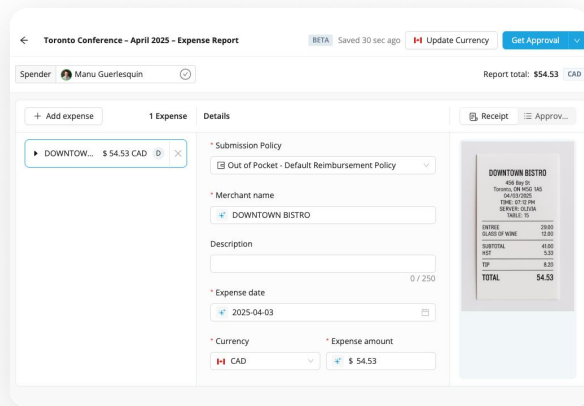
4. Upload your receipts

You can either drag and drop or upload your receipts.

- **Submission Policy** – Selected in the previous step.
- **Merchant Name** – Automated from the receipt.



The image shows three overlapping screenshots of the Float app interface. The top screenshot shows the 'Request Spend' button in the left-hand menu. The middle screenshot shows the 'Request Spend' modal with two options: 'Request Card or Limit' and 'Request Reimbursement'. The bottom screenshot shows the 'Create Reimbursement Report' modal with the following fields: Report Name (Toronto Conference - April 2025 - Expense Report), Team (Marketing), Approval Policy (Default Policy), and Submission Policy (Out of Pocket - Default Reimbursement Policy). The 'OK' button is highlighted in blue.



- **Description** – e.g. “Taxi to client meeting” or “Team lunch”.
- **Expense Date** - Automated from the receipt.
- **Currency** – Automated from the receipt.
- **Expense Amount** – Automated from the receipt.

You can override any of the fields automated from the receipt.

5. Submit for Approval

- Review everything one last time.
- Click **“Get Approval”** at the top right of the report.
- That’s it! 🎉



Add Your Bank Info to Get Paid (optional)

To get paid directly from Float and not have to wait for the next payroll, you need to securely add your personal bank account details.

1. After submitting your first reimbursement, you’ll be prompted to connect your bank
2. Choose either:

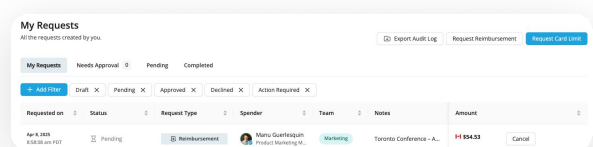
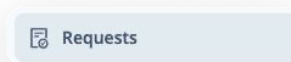
- **Connect via Plaid**
- **Manually enter your account info**



How to Check the Status of Your Reimbursement

1. Go to the **“Requests”** section from the side menu.
2. Go to **“My Requests”**.
3. Look for the Status column next to each request
4. You’ll see one of the following:

- **Draft** – Your request hasn’t been submitted yet.
- **Pending** – Your request is waiting for approval.
- **Approved** – Your request was accepted.
- **Declined** – Your request has been declined.
- **Completed** – The money has been sent to your bank account.



If anything looks off, or your status hasn’t changed after a few days, reach out to your admin.