



On-Sight: Lead Travel Expense Submission Standard Operating Procedure

Purpose

Allow Leads to record their accrued expenses for travel through Nth Degree's On-Sight Mobile Application for ease and efficiency of submission.

Creating a Travel Expense Report within On-Sight

- 1) Lead has access to their approved Lead Travel Requests (excluding "Local-No Travel" requests) via the "Travel Expenses" tile in the mobile app, access is based on their security level
 - a) If a Lead has two requests for one show (i.e., a separate install and dismantle request), the request with the latest travel out date will allow expenses to be added. The earlier request is displayed but locked so that expenses cannot be added.
- 2) Leads will be able to record/accumulate expense receipts during their trip against the Lead Travel Request listed in the On-Sight App
 - a) To add expenses, choose "Add New Expenses" for the first expense, and the "+" button for each expense after
 - b) Choose the Expense Category that aligns with the expense
 - c) Add the date, description, and amount of the expense
 - d) Upload a photo of the expense (applicable to all expenses except Mileage)
 - e) Choose "Save Expense Details"
 - f) Repeat until all expenses are added
- 3) When all expenses have been added, Leads will generate the Expense Report for their travel expenses by choosing "Submit"
 - a) If there are no expenses accrued, the lead will choose "No Expenses, Submit" to remove the Travel Request from their view within the App (i.e., if they are using a company credit card, or all expenses have already been paid)

- 4) Leads have 10 days from Travel Out Date to submit their expenses
 - a) A countdown is included on their Lead Travel Request within the App to indicate how many days they have left to submit their expenses
 - b) If expenses have already been added but not submitted when the timer expires, the expenses are automatically submitted
- 5) Once the expenses are submitted, the Lead Travel Request is removed from the Lead's view within the app and cannot be accessed again through the On-Sight App

Processing a Travel Expense Report

- 1) When a Lead completes/submits their travel expenses, the app creates the PDF format of the existing Expense Report with attached photos and sends to Planning@nthdegree.com
 - a) The Lead is copied on the email sent to the Corporate Planning Team
- 2) The Corporate Planning Team will review the expenses within 48-72 hours
- 3) The Corporate Planning Team will reply to the Lead through the Expense Report email thread if there are any issues with the submitted expenses or to notify the Lead that their expenses have been submitted
 - a) If there is an issue with the submitted expenses, all corrections must take place manually, *not* in the On-Sight App (this may mean having to recreate the Expense Report manually)
- 4) Expenses are reimbursed by accounting within 7 days of submission from the Corporate Planning Team.

Questions?

Regarding Expense Reimbursement

Contact the assigned Travel Specialist from the Corporate Planning Team with any questions regarding the reimbursement of your expenses.

Regarding On-Sight Travel Expense Module

If On-Sight is not working as outlined above, please escalate to your manager so that they may escalate internally on your behalf to our IT Team.

Document Revisions

- Original Document (V1) Created March 2026 by Ashlyn Garrett