

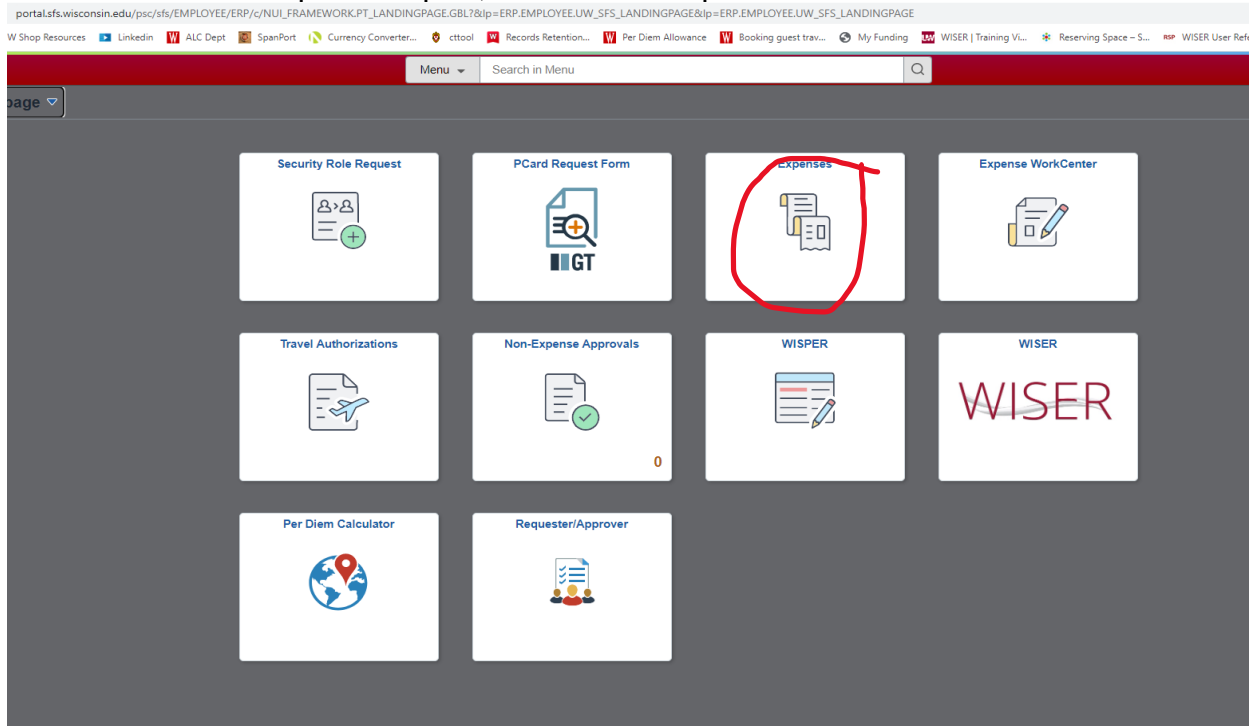
Creating an Expense Report

https://portal.sfs.wisconsin.edu/psc/sfs/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL

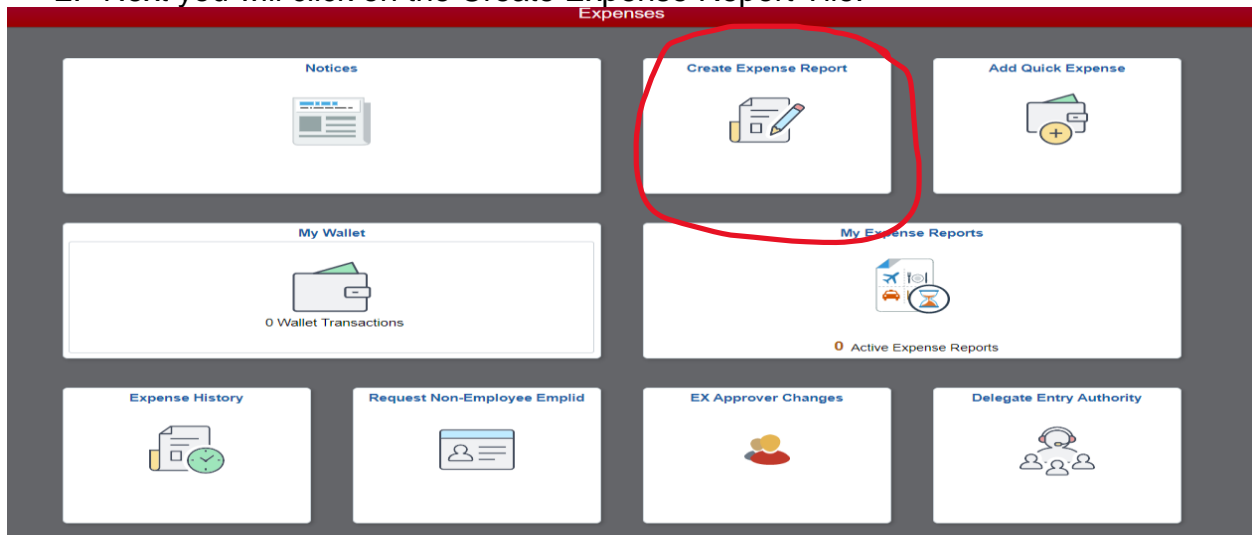
You MUST apply for reimbursement within 90 days of your event. Reports submitted after 90 days WILL NOT get reimbursed.

Below is the landing page you will see when you click on the link above.

1. To start an expense report, click on the Expenses Tile.



2. Next you will click on the Create Expense Report Tile.



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3. On this page, you will begin filling in your information. Anything with an * is required.

Expenses Expense Report

Report NEXT
TRACY DEEVERS

General Information

*Business Purpose
*Description
*Default Location
*Reference OUTSTATE
Date of departure
Date of return

Attachments
Accounting Defaults
Justification (S MISSING)
General Information

Creation Date 11/07/2022 TRACY DEEVERS
Updated on 11/07/2022

Expense Details

Expense Report Action
Custom Funding (UWMSN482105/101)

Business Purpose:	Choose the appropriate purpose from the drop down.
Description:	Enter a brief description of your purpose.
Default Location:	Enter the location of your event.
Reference:	Select the category of the travel (INSTATE, OUTSTATE, FOREIGN, NONTRAV).
Date of Departure:	Enter the date you are leaving.
Date of Return:	Enter the date you are returning.

4. Click on the JUSTIFICATION in the upper right. The Justification is critical. The number one reason expense reports get returned is because the Justification does not contain how the purchase benefitted your research and/or the University.

Follow the template below to construct your Justification:

“I traveled to the national conference for linguistics **in Portugal on May 5-9. As a professor of linguistics**, specifically in Portuguese, **attending and presenting at this conference helped me stay up to date on the most current research** and network with colleagues who share similar research interests. **Lunch was provided by conference. Airfare paid on Tracy Deavers P-Card.**”

Items that are in **Bold**, help to provide necessary background and benefit to your position and/or the University. Please replace bold text with the equivalent information for your own reimbursement request.

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5. Add attachments by clicking on Attachments section in the upper right. (Attachments must be in PDF format)

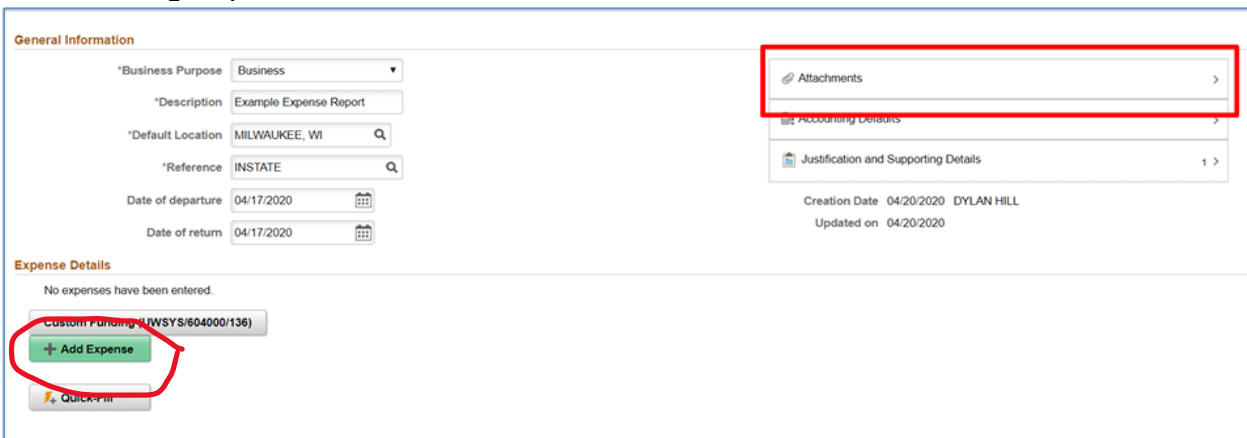
The following must be added to the Attachments:

- Proof of the event
- Receipts

When you are finished adding attachments, click on Done.

6. Under Accounting Defaults, put in the funding string you wish to use for this expense.
 - If you are in the Department of Asian Languages and Cultures, use 482100 in the Department field of the funding string.
 - If you are in the Department of Spanish and Portuguese, use 488500 in the Department field of the funding string.

7. Adding Expenses:



The screenshot displays the 'General Information' section of an expense report form. The 'Business Purpose' is set to 'Business', the 'Description' is 'Example Expense Report', the 'Default Location' is 'MILWAUKEE, WI', and the 'Reference' is 'INSTATE'. The 'Date of departure' and 'Date of return' are both set to '04/17/2020'. On the right side, the 'Attachments' section is highlighted with a red box, showing a list of attachments with a plus icon and a right arrow. Below the 'Attachments' section, there are sections for 'Accounting Defaults' and 'Justification and Supporting Details'. The 'Creation Date' is '04/20/2020' by 'DYLAN HILL', and the 'Updated on' date is '04/20/2020'. In the 'Expense Details' section, a message states 'No expenses have been entered.' Below this, there is a 'Custom Funding (MWSYS/604000/136)' field and a green '+ Add Expense' button, which is circled in red. A 'Quick-Fill' button is also visible at the bottom left.

Click on the Green +Add Expense Box to begin adding your expenses.

Once you complete a line, you can add additional claims by clicking on the ADD button on the left side of the screen.

8. Once you have entered all your expenses, you are ready to submit. Press the gray REVIEW AND SUBMIT button in the upper right. This will take you to the Expense Summary page.
9. Once you review the Expense Summary page, click SUBMIT in the upper right. If you would like to save your expense report for modifications, click the green SAVE button.

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Helpful Hints

- You must apply for reimbursement within 90 days of your event. Reports submitted after 90 days will not get reimbursed.
- Expense reimbursements must be submitted within 90 days of:
 - The end of the trip (for travel-related expense reimbursements)
 - The date of the purchase (for non-travel related expense reimbursements)
 - The end date of the course (for tuition or job training expense reimbursements)
- Expense reimbursements sent back to the traveler for correction must be resubmitted within 90 days of being sent back.
- Travelers may seek reimbursement for airfare, registration fees, lodging, and vehicle rental reservation guarantees at the time payment is made. All other travel expenses are reimbursable after the trip is complete.
- Keep your documents for reimbursement in a folder that you can easily find and attach.
- A meal and lodging per diem will be paid to you for your dates of travel. The per diem is determined by your travel location and dates of travel.
- [Per Diem Calculator](#)
- If you are claiming mileage, be sure to attach a map showing your starting and ending points as well as the mileage according to the map.
- When entering an expense, always put in the date of purchase, not the date of the event.
- For more information on Getting Reimbursed visit <https://businessservices.wisc.edu/travel-reimbursement/getting-reimbursed/>
- More detailed help on reimbursements such as airfare and lodging are available [here](#)