

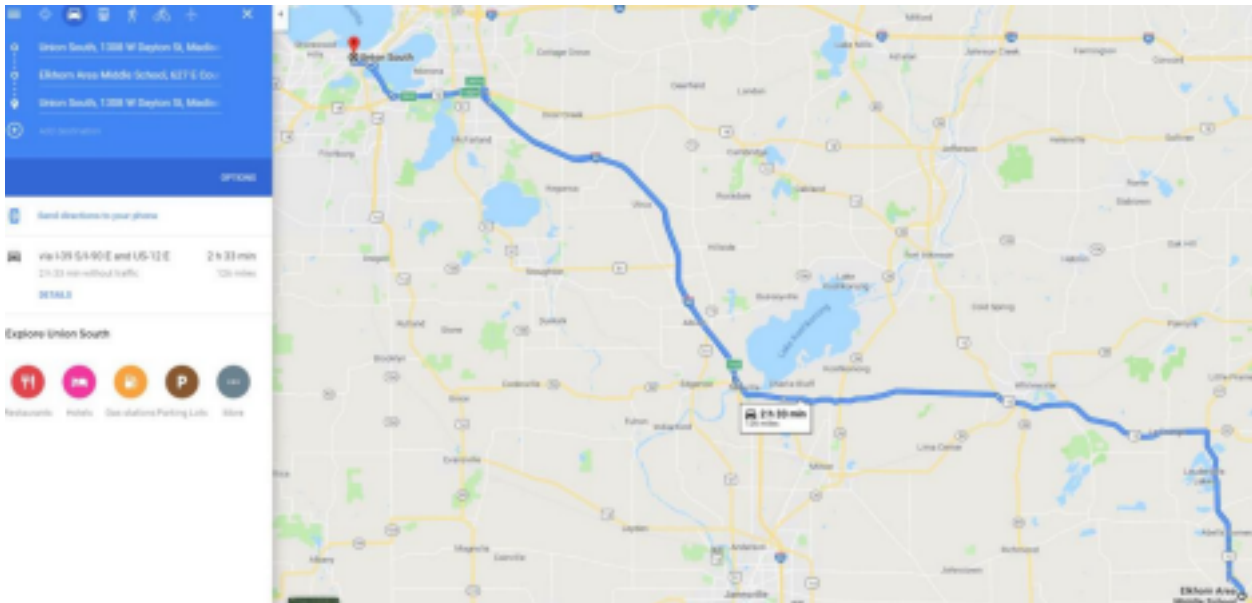
General Expense Reimbursement Instructions

- 1) Visit <https://businessservices.wisc.edu/travel-reimbursement/getting-reimbursed/> and select "Access E-Reimbursement" under 'How do I get Reimbursed?'
 - a. Log-in with your NetID if requested
- 2) Select the "Expenses" tile
- 3) Select the "Create Expense Report" tile
- 4) Under 'Business Purpose' select "Business"
- 5) Under 'Description' enter "[Event name] [enter city]"
- 6) Under 'Default Location' enter and select the city which you traveled to. If the city does not appear in the list, choose the closest available city
- 7) Change the 'Reference' field to "Instate"
- 8) Enter date of departure and return
- 9) Select "Custom Funding" – "Use Custom Values" and enter your unit's funding string.
 - e. Once entered, select Apply in the top right corner
- 10) Select the 'Justification' tab on the right side of the page, select 'Add Notes' and enter a note including the below information:
 - a. Name of the traveler, date(s) traveled, name of event or program, explanation of how program benefits UW/the Wisconsin Idea.
 - b. *If a Fleet vehicle is used, also include:*
 - i. I reserved and drove a Fleet vehicle to and from the destination.
 - c. *If a hotel was booked, also include:*
 - i. Lodging at [insert hotel name] was paid for on [insert payment method, if hotel was paid for separately] for the night(s) of [insert date(s)]. OR
 - ii. Lodging at [insert hotel name] was booked for the night(s) of [insert date(s)] because [insert justification for lodging, such as distance from Madison or late night event].
 - d. Once entered, select 'Done' in the top right of the window, and select 'Done' again to save the note.
- 11) Under the 'Attachments' tab
 - a. **Please include a PDF copy of your event confirmation or other proof of the event, such as a flier or a poster.**
 - b. **Please include a screenshot of a Google maps image showing your mileage, if applicable.**
 - c. **Please include your hotel folio, if applicable.**

Please note:

Reimbursable Mileage. Travelers are eligible for mileage reimbursement in the following situations:

- **Visiting Temporary Worksites:** Employees that travel to temporary worksites (your talk location) may be reimbursed for mileage based on where they depart and where they return:
 - **Departing from and Returning to the Assigned Headquarters** – mileage is reimbursable.
 - **Departing from or Returning to Personal Residence** – when traveling to/from their personal residence, travelers may be reimbursed **for the lesser of:**
 - mileage to/from their *personal residence* to/from their temporary worksite **-or-**
 - mileage to/from their *assigned headquarters* to/from their temporary worksite.



- 12) Select the 'Add Expense' button at the bottom of the page
 - a. Under new expense, click "Expense Type"
 - i. To record mileage, select "Mileage" as the expense type and enter the miles traveled, making sure the amount aligns with the Google Maps screenshot provided.
 - ii. For day trips (not-overnight) – You may claim a \$15 Day Trip Meal Allowance by selecting "Day Trip Meal Allowance" (6th choice down from top)
 - iii. For overnight trips – select "Meal and Incidental Per Diem" (13th choice down from top) for each day.
 1. Select the per-diem deductions applicable for each day.
 - a. "First/Last Day of Trip" – Select if date was first or last date of trip.

b. If breakfast, lunch, or dinner was provided by the host group, select the provided meal form the following:

i. Provided Meal 1 – Breakfast

ii. Provided Meal 2 – Lunch

iii. Provided Meal 3 – Dinner

iii. If you reserved and paid for your own hotel with personal funds and are seeking reimbursement, select "Lodging-Individual". Complete the additional expense information and attached a copy of the hotel receipt and a screenshot of the lodging Maximum amount that can be calculated here:

https://portal.sfs.wisconsin.edu/psc/sfs/EMPLOYEE/SFS/c/UW_EX_CUSTO M.U W EX PDCALC.GBL

13) When in the Expense Details window, click "Review and Submit" in the top right corner, then select "Submit" again in the top right corner to submit the expense report for reimbursement.