e-Reimbursement Training
Login

- Open an internet browser
- Go to the UWL Website Homepage
  - Click on A-Z directory
  - Scroll down and click on Business Services
- At the Business Services Homepage
  - Click on e-Reimbursement login
- Logging into e-Reimbursement
  - Select UW-La Crosse
    - Click on Go
  - Enter your NetId and Password
Homepage & Navigation

- Homepage:

  - Contains Navigation Tiles
    - When clicked on, they take you to a navigation tile collection
Expense Report

• Use the Expenses tile to get into Travel and Expense functions
Expense Report

- From the Expense tile, you can:
  - Enter a new expense report
  - Enter expenses into your wallet for later use
  - View Expense History

- To get started click **Create Expense Report**
Create Expense Report

- **Business Purpose:** should be Business
- **Default Location:** Destination location
- **Reference:** Either INSTATE or OUTSTATE
- **Attachments:** Should include Mileage maps and No campus office letter
- **Accounting Defaults:** Should be 102-6-030120
- **Justification:** Description of your travels
Expense Details

• Expense Report Action:
  • Add Expenses Lines
Expense Entry

- **Date**: The day of travel
- **Expense Type**: Mileage
- **Description**: Starting location to destination
- **Transportation ID**: Standard Rate if under 100 miles round trip, Turndown Rate if 100 miles or more round trip
- **Miles**: Round trip mileage
- **Reimbursement Method**: Personal Funds
- **Originating Location**: Home or Office location
- **Destination Location**: School location
- **Non-Reimbursable**: NO
Add Additional lines

- To add an additional expense click the **Add** button.
- To copy an expense line click on the **More** button.
  - Select the line to copy and click **Copy**.
  - Input new date.
Submitting Expense Report

• Once you have entered all your expense lines, you can either Save the report for later or Review and Submit.

• **If you did not enter justifications/support, it will force you to enter this.**
My Expense Reports - Status Review

- You can view all your expense reports from this summary screen. Clicking on the heading will show a list of items in that category.
- You can take action on them by clicking on the arrow under the action column of the report. Items not submitted can be opened and reviewed & submitted. Items awaiting approval can have reminder notifications sent.
My Expense Reports

- Copy to New Report – will create a new report based on an existing report which can then be modified.
- Delete Report – will allow you to delete a report in your queue.
- Send Notification – allows you to send a message regarding the report selected.
Expense History

- Copy to New Report – will create a new report based on an existing report which can then be modified.
- Send Notification – allows you to send a message regarding the report selected.
Mileage Maps

• You can add an additional destination, so it gives you round trip mileage
  • Not required as you may just double your one-way route
• Must use most direct route
• File type should be .pdf or .jpg
• Save them in a folder to be used on your next expense report
Recap

- It is the responsibility of the Supervisor to fill out and complete their mileage reimbursement.

- Must upload as attachments:
  - Mileage Maps (Google Maps or MapQuest)
    - Save your maps to reuse on your next report
  - No on campus office letter (if applicable)

- You are now able to input the exact mileage
  - Must use most direct route

- Must have completed Vehicle Use Agreement (UVA)
  - If you had previously complete on the paper form you must complete an electronic VUA

- Starting address and school must be included in the expense line description

- Expense Reports must be submitted within 90 days of trip completion
Questions