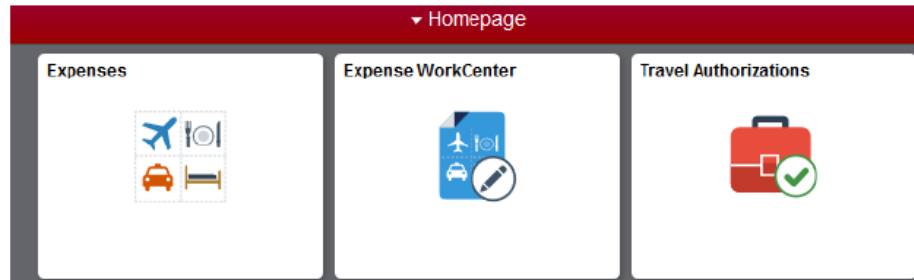# e-Reimbursement Training

# 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

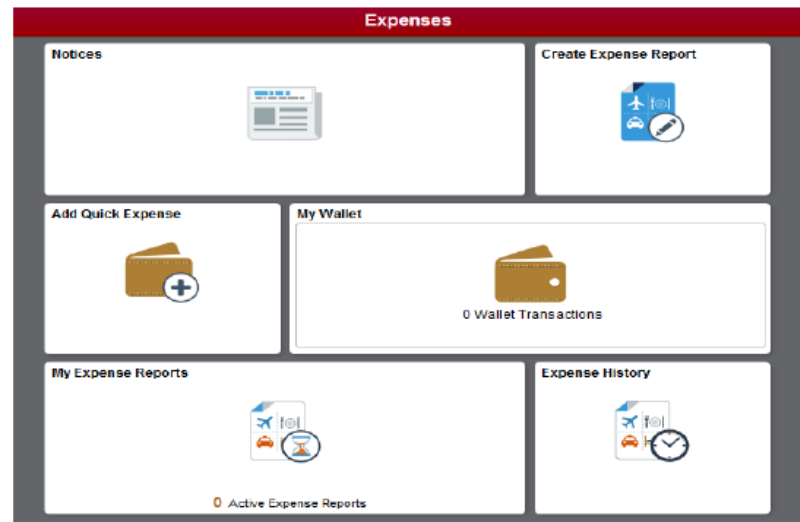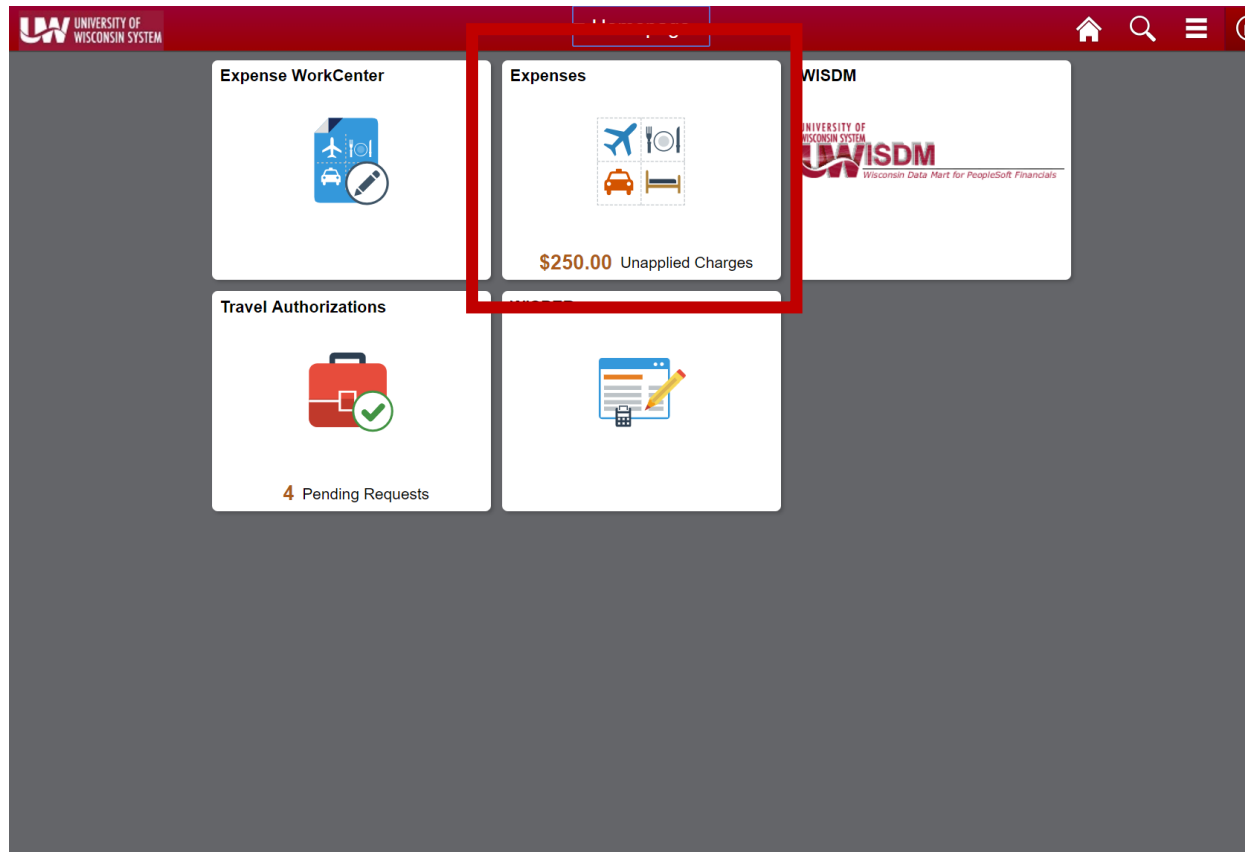# Homepage & Navigation

- Homepage:



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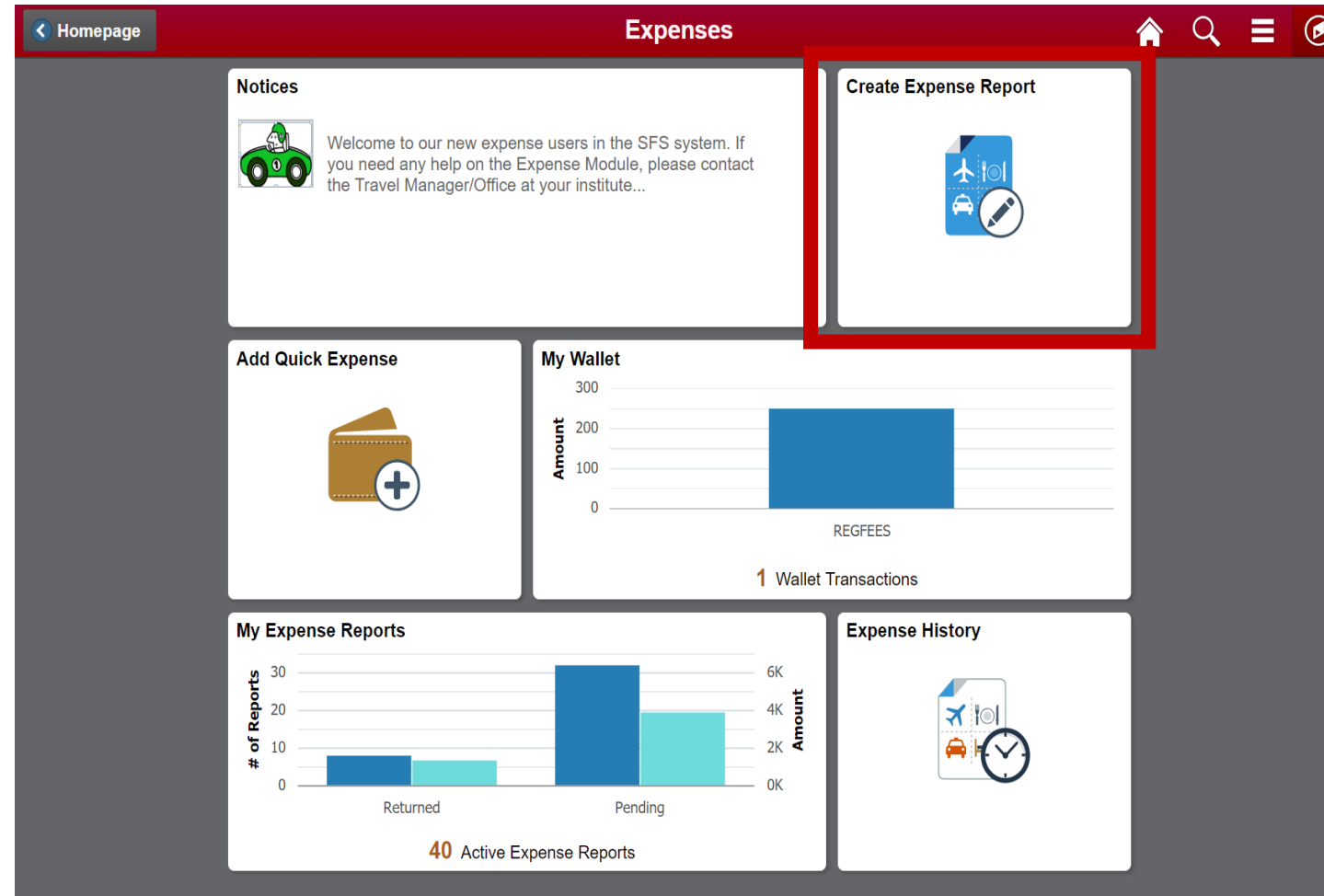
# Expense Report



- 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.
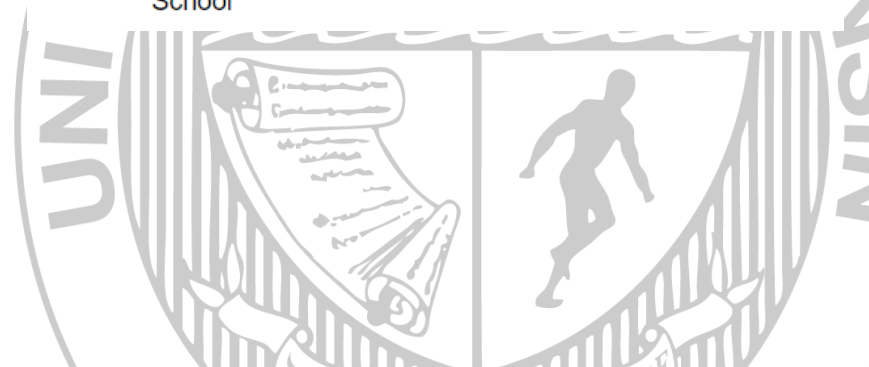
- **If you did not enter justifications/support, it will force you to enter this.**

# 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.
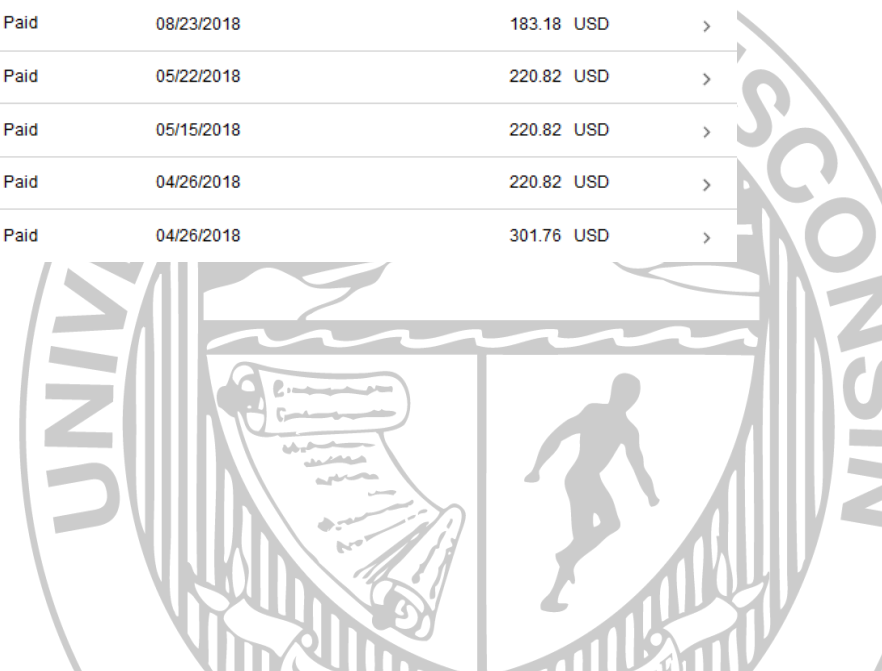
# Mileage Maps

- 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
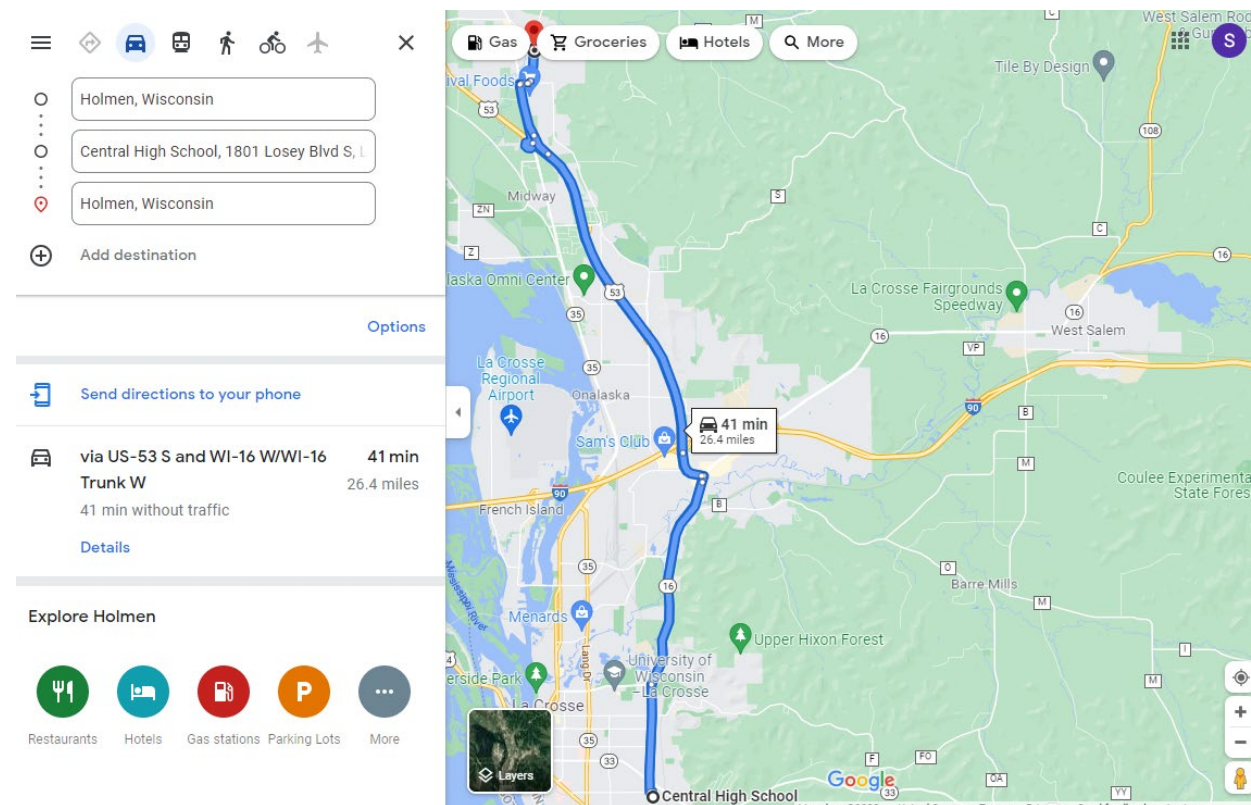
# Recap

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

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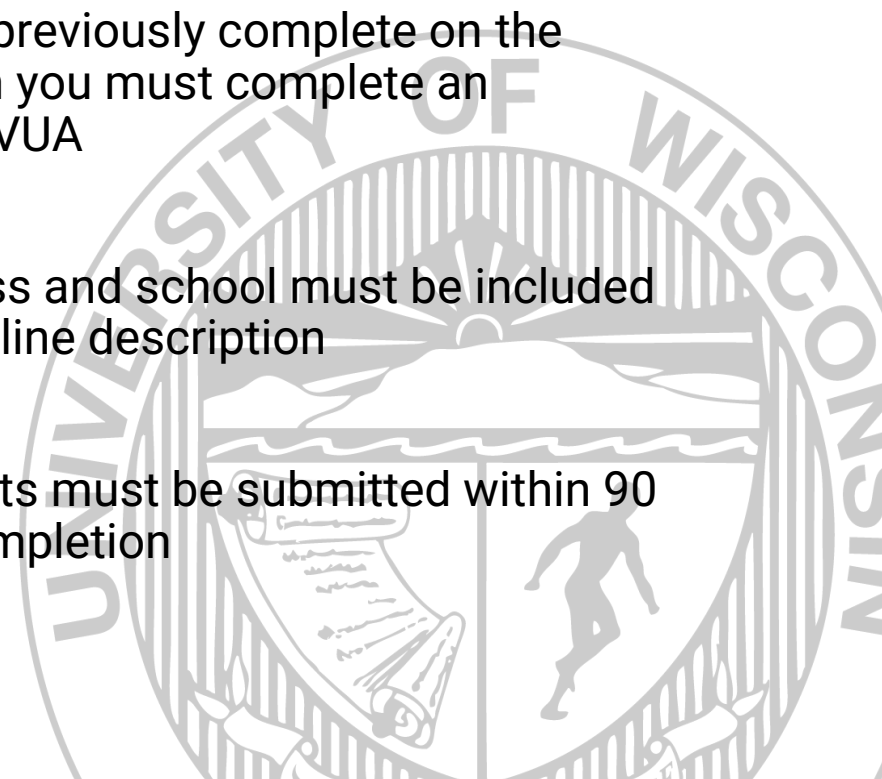  - Mileage Maps (Google Maps or MapQuest)
    - Save your maps to reuse on your next report
  - No on campus office letter (if applicable)

- 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