

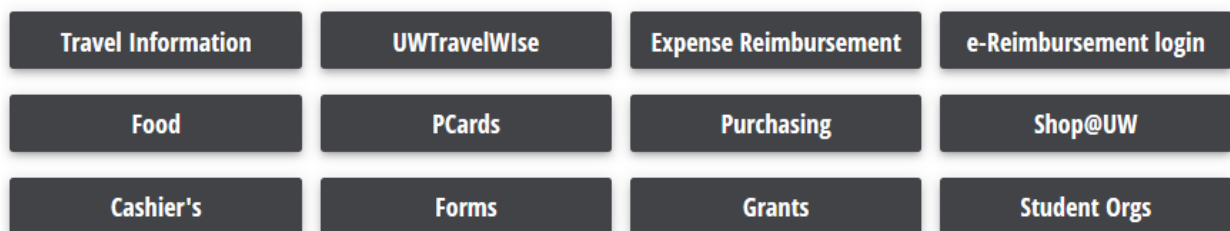
Alternate - How to Create/Submit e-Reimbursement for Relocation

Submitting an e-Reimbursement on behalf of an active employee (after employee start date)

1. In order to submit an e-Reimbursement on behalf of an active employee, the employee will need to add you as an alternate. Please click on the following for instructions: [How to Assign an Alternate in the Expense Module](#)

Entering the e-Reimbursement

1. Go to the Business Services web page: <https://www.uwlax.edu/business-services/>. Once there you will see the following menu items (boxes):

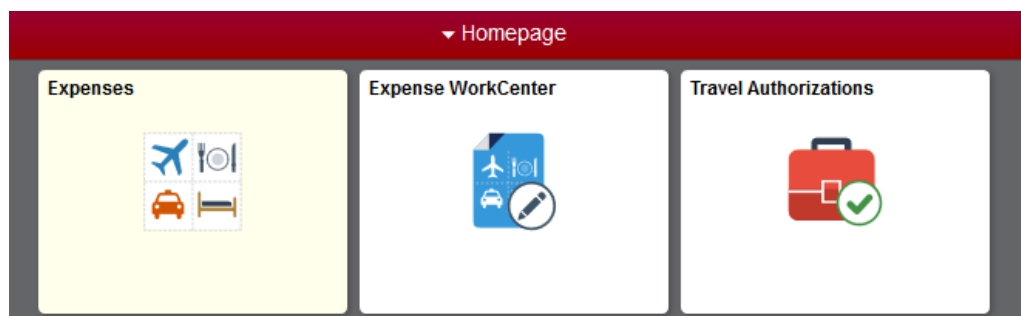


Click on the “e-Reimbursement login” option.

Select your organization: “UW-La Crosse” for the drop down

You will be asked to login with your Net ID credentials.

2. Once logged in, you see the Homepage:



Click on “Expenses”

3. This will bring you to the Expenses page:



Click on “*Create Expense Report*”

Click on the green down arrow next to your name and click on “Change Employee”

Select the name of the individual

4. This brings you to the Expense Report where you will enter your expenses:

Expense Report

Report NEXT
MICHAEL GASPER

General Information

*Business Purpose

*Description

*Default Location

*Reference OUTSTATE

Date of departure

Date of return

Attach Receipt >

Accounting Defaults >

Justification (IS MISSING) 0 >

Creation Date 10/09/2018 MICHAEL GASPER
Updated on 10/09/2018

Expense Details

No expenses have been entered.

Custom Funding (UWLACI072400/102)

+ Add Expense

Quick-Fill

5. **Business Purpose:** Click on the drop-down menu arrow ▼ and select **Relocation**.
6. **Description:** In thirty characters or less, enter a brief description that will be used to identify the expense report, such as Relocation Reimbursement.
7. **Default Location:** name of the city where you are relocating to
 - i. Click on the magnifying glass
 - ii. Click on Select Criteria
 - iii. Enter name of the location in the Description field and click on **Search**
 - i. For La Crosse, enter *La Cro* and click on **Search**
 - iv. If the city is found, click on the corresponding line
 - v. If no results are found, click on **Search Criteria**
 - i. Enter the name of the *county* in the Description field in which you are relocating to
 - a. Click on the corresponding line
8. **Reference:** If moving from outside Wisconsin, select **Outstate**, as most expenses will be incurred outside the claimant's headquarter state (Wisconsin). If moving from inside Wisconsin, select **Instate**.
9. **Date of departure:** Enter the date of departure from originating location.
10. **Date of return:** Enter the date of arrival in new residence location.
11. Click on the **Attachments** button to upload supporting documentation.
 - a. Then click on the **Add Attachment** button. Click the **My Device** button, locate the desired file and click the **Upload** button. Click on **Done** to upload the attachment. Repeat this process to add multiple attachments.
 - i. Attach a copy of your fully executed appointment letter – this outlines the relocation reimbursement amounts. You may redact salary or other sensitive information prior to attaching.
 - ii. Attach copies of all receipts to support reimbursement amount(s)
 - b. When all attachments have been uploaded, click on **Done**.
12. Click on **Justification**
 - a. Click on **Add Notes**
 - b. Enter the business justification for the expense report. This field allows for an unlimited number of characters. Example: Relocation from Charleston, South Carolina to La Crosse, Wisconsin.
 - i. **Note:** All acronyms must be spelled out.
 - c. Click on **Done**

- i. Click on **Save** in the upper right hand corner.

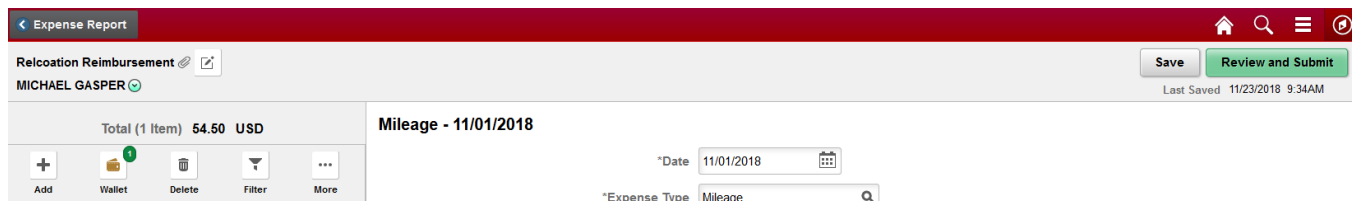
*Note: If you have multiple expense for **Relocation-Direct Moving Costs** based on your move, follow the directions in step 14 for each expense.*

- ii. **Relocation-Stipend** - *only if specified in the appointment letter – no receipts needed.*
- d. **Description:**
 - i. Enter a brief description regarding the expense
- e. **Payment:**
 - i. Select **Personal Funds** – reimbursable expenses are paid directly to the claimant.
- f. **Amount:** Enter amount specified in appointment letter (in US Dollars)
- g. **Originating Location & Expense Location**
 - i. Click on the magnifying glass
 - ii. Click on Select Criteria
 - iii. Enter the first five letters of the location in the Description field and click on **Search**
 - iv. If the location is found, click on the corresponding line
 - v. If no results are found, click on **Search Criteria**
 - a. Enter the name of the *county* in the Description field in which you are relocating to
 - b. Click on the corresponding line
 - vi. Click on **Save** in the upper right hand corner.
- iii. **Mileage** - *only if specified in the appointment letter and include as an attachment a Google Map using the most direct route as supporting documentation.*
- d. **Description:**
 - i. Enter a brief description regarding the expense
- e. **Transportation ID:** Click on the drop-down menu arrow ▼ and select **Standard Rate**
- f. **Miles:** enter one-way miles based on the most direct route
- g. **Payment :** Select **Personal Funds** – reimbursable expenses are paid directly to the claimant.
- h. **Originating Location & Expense Location**
 - i. Click on the magnifying glass
 - ii. Click on Select Criteria
 - iii. Enter the first five letters of the location in the Description field and click on **Search**

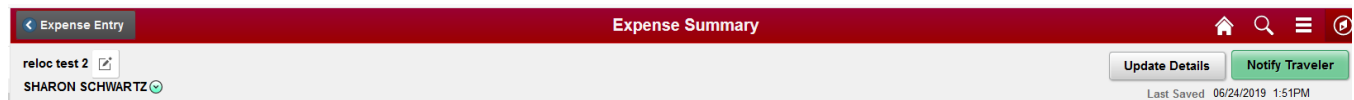
- iv. If the location is found, click on the corresponding line
- v. If no results are found, click on **Search Criteria**
 - a. Enter the name of the *county* in the Description field in which you are relocating to
 - b. Click on the corresponding line
 - c.
- vi. Click on **Save** in the upper right hand corner.

15. Click on **Save** to save the report

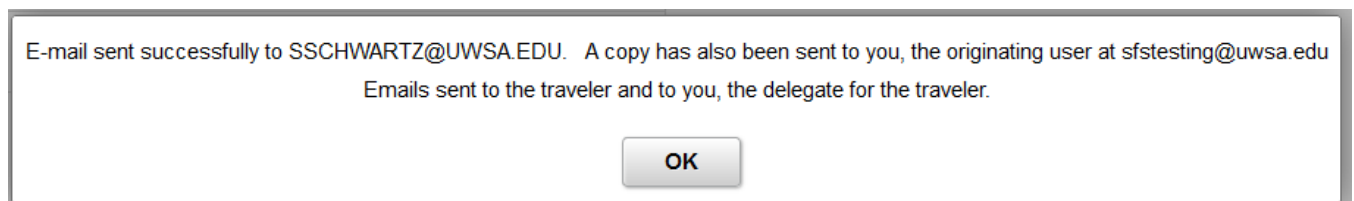
Report Submission:




- i. Click on **Review and Submit** to take you to the Expense Summary screen.



- ii. Click on **Notify Traveler** to submit the report.



- iii. Click will be **OK** to the pop-up message regarding email being sent to the traveler and you as the originator of the report.


- iv. Click on  to get back to the homepage.

After submission, the expense report is routed to the appropriate department approver(s) and auditor for review and approval.

Navigation Items:



Add

- Click on **Add** to enter information regarding another expense
- Click on  to navigate back to the header page