

How to Create/Submit e-Reimbursement for Relocation

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):



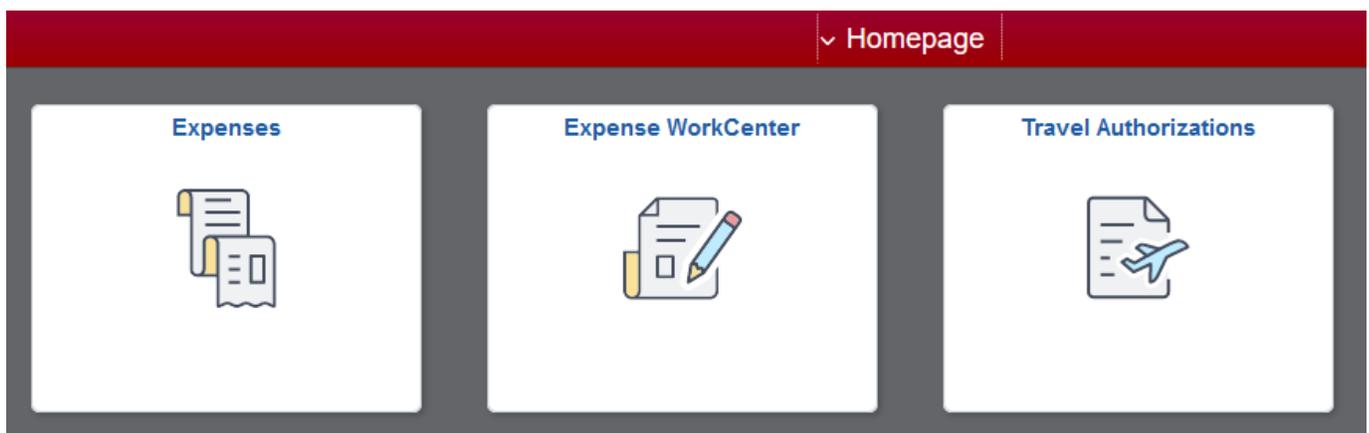
Click on the Expense Reimbursement tab

Click on the the e-Reimbursment hyperlink or click [here](#)

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*”

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

General Information

*Business Purpose

*Description

*Default Location

*Reference

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 (UWLACI072400102)

+ 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**
13. To review the funding string, click on **Custom Funding** and a pop-up menu will appear.
 - a. Click on **Done** to keep information as listed, or
 - b. Click on **Use Custom Values** if you wish to make a change.
 - i. Update with the appropriate funding information and when completed, click on **Done** to return back to the Expense Report.

14. Complete the *Expense Details* section of the Expense Report:

- a. Click on **Add Expense**
- b. **Expense Date:** Enter move date or date expense was incurred.
- c. **Expense Type:** Your options for relocation are as follows:

Note: steps a-c above need to be completed for each expense line

- i. **Relocation-Direct Moving Costs** – *only if specified in the appointment letter and include supporting documentation and receipts as attachments.*
- d. **Description:**
 - i. Enter a brief description regarding the expense
- e. **Payment:**
 - i. Select **Personal Funds** – reimbursable expenses are paid directly to the claimant.
 - ii. If anything is paid by the University, select **Prepaid Purchasing Card**
- f. **Amount:** Enter amount spent based on actual costs incurred (in US Dollars)
- g. **Merchant:** Select either Preferred or Non-Preferred based on the following:
 - i. Preferred Merchant – a UW System Contract Vendor was utilized for the commercial move. Select either Piepho Moving & Storage (Allied Van Lines) or Nelson Westerberg (American/Atlas Van Lines)
 - ii. Non-Preferred Merchant - Enter the name of the provider or where expenses were incurred for direct moving costs.
 - i. Non-Contract Vendor for commercial move
 - ii. Self-Move (U-haul, etc.)
 - iii. Reimbursable Moving Supplies (Home Depot, USPS, etc.)
- 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
 - i. If no results are found, click on **Search Criteria**
 - ii. Enter the name of the *county* in the Description field in which you are relocating to
 - iii. Click on the corresponding line
 - v. Expense Location: prepopulated based on the default location entered above
- 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.
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- 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.*
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- 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

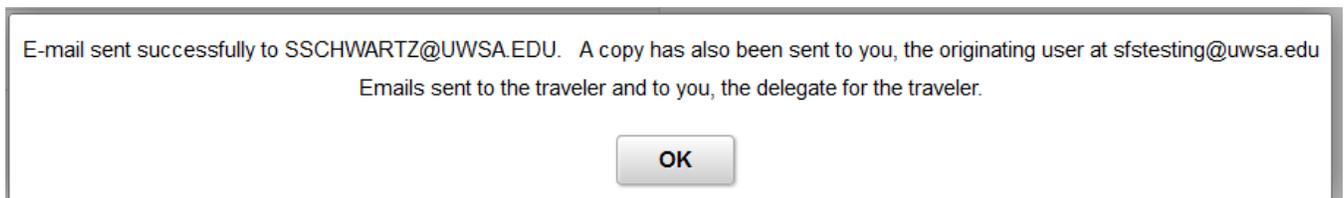
Report Submission:



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