Creating an expense report is required when:
- Seeking reimbursement
- Clear the transactions from a purchasing card
- Clear cash or other advances

CREATE AN EXPENSE REPORT

1. In the search box, search “create expense report”. Select Create Expense Report task.

2. Select one of the 2 choices:
   - New Expense Report
   - Copy a previous report (Note: all information EXCEPT the receipts will be brought over)
3. **Click OK.**

4. **On the next page, the top portion allows for changes to Payment type (if direct deposit for expenses has been setup by the worker).**
5. Enter your expenses. Be sure to complete all required fields (*) are required) and attach receipts. **NOTE:** Receipts can be added individually for each Expense Item or can be attached using the Attachment tab for the report as a whole.
# Expenses

## Create Expense Reports

The Expense Item allows you to select the category of the expense. In essence, this is the name description of the Spend category used to allocate the expenses. This field may trigger additional item details to be provided.

Memo field is required. This field should provide pertinent notes on the business purpose for this specific expense.

Click on Submit once all expenses have been entered for the report.

### Instructional Text

Add Business Purpose in Line Level Memo field.

- **Group events**
  - Use the event name as the attendee name.
  - **Academic Departments**
    - **Expense Case**: $65 per person with a limit of 5 guests
    - **Lunch Case**: $35 per person limit 5
  - The cap should allow for an alcoholic beverage or a deposit at one of Claremont’s nicer restaurants. If the chair of a department believes that a particular event may exceed the cap, please contact the Academic Dean prior to the event.

### Item Details

Additional item details may be required depending on the expense item selected. Instructional text will be provided to guide you with filling out the item details.

### Attachments from File

- **Drop files here**
- **Select files**

### Attachments from Mobile Application

Attach receipts that were saved from the mobile app.
6. After all the expenses or charges have been added and allocated on the report, click Submit. The expense report will go through an approval process. Once approved the expense report will appear on budget reports and be ready for payment.

Reports
My Expense Reports: View your expense reports with the date, status, amount, and other details. Perform related actions such as cancel, change, or copy an expense report