

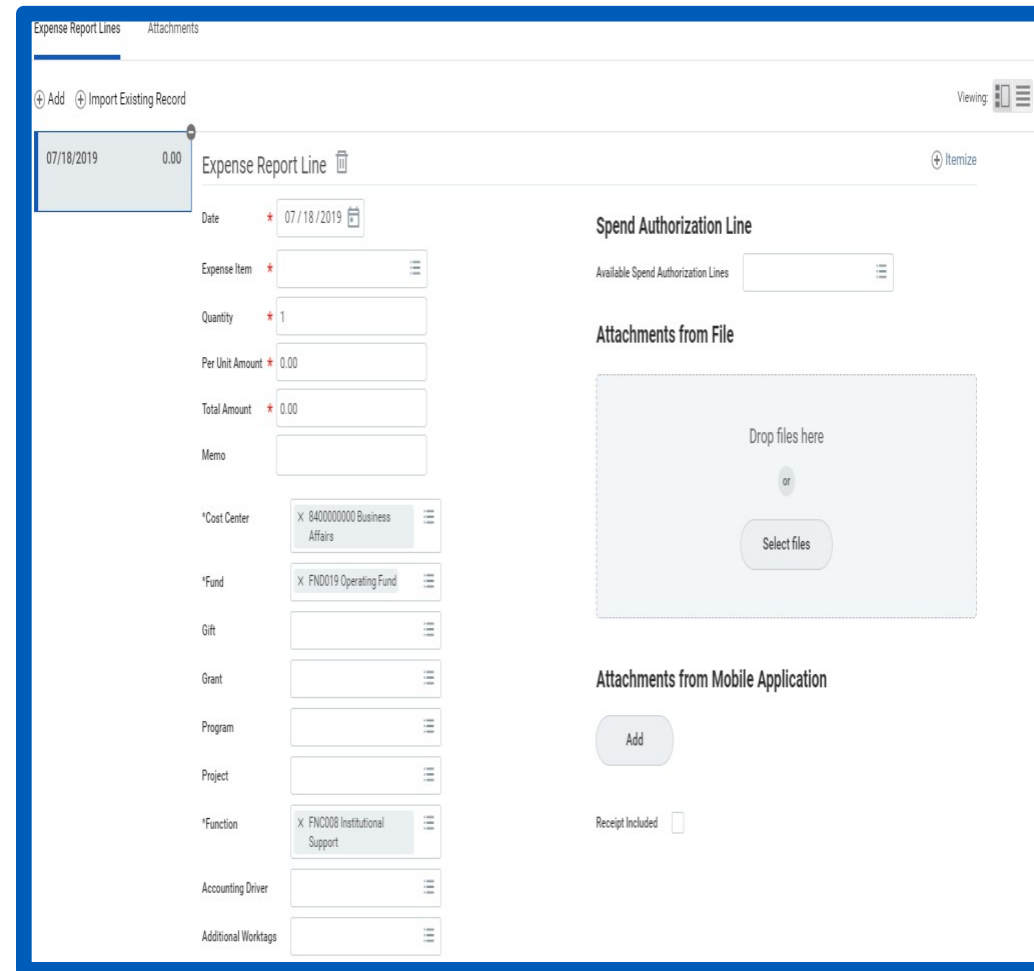
HOW TO SUBMIT A TRAVEL EXPENSE REPORT

After completing work related travel, it is important to get reimbursed for travel related expenses. Based on your University and State of Louisiana travel policies, this process allows you to complete a travel expense report based on your prior travel spend authorization. Please review the PPM 49 Louisiana Travel Policy prior to continuing. Connect to Workday from the icon in the top right corner of your University email.

From the Expenses application




1. Select **Create Expense Report**.
2. Expense report information -- select an option of **Create New Expense Report**, **Copy a Previous Expense Report** or **Create a New Expense Report from Spend Authorization**. The related action *** allows you to choose previous submitted and approved reports and authorizations.
3. Fill in all applicable fields, * asterisks indicate required fields. Business Purpose must be selected. Select all applicable expenses which have been charged to CBA or P-Card. Note: before completing expense reports, guarantee all charges to University P-Cards and CBA are available to capture on your final expense report.
4. Check for correct cost center (or grant, gift, program, or project if applicable) worktag as necessary. Do this step on the first line so it populates on additional lines added. *Note: if this is a grant related expense, select **Additional Worktags** and select **Grant Treatment**. Designate if this is Domestic Travel or International Travel.*
5. Click **OK**.
6. When required, attachments should be added in the **Attachments for File** section.




7. Click **+ Add Row** to include additional expense lines. Follow the process until all your expenses are added. Each expense will require an expense report line. Fill in all applicable fields, * asterisks indicate required fields. Expense line date is the date of the expense or the start/end of travel.

8. For expense item **Hotel**, add the total of the bill in the total amount box including taxes and fees. In the quantity line, type number of nights. Fill out Item Details for Arrival, Departure Date, and Destination.
9. For expense items **Breakfast, Lunch or Dinner** create a line for each choice. If completing for multiple days, enter a quantity and per unit amount, based on the daily tier rate, and the total will calculate. Item details must be filled out for Departure Date/Time, Arrival Date/Time (Return), Destination.
10. For each Expense Report Line, check for correct cost center (or grant, gift, program, or project if applicable) worktag as necessary. If charged to a gift, grant, program or project select the corresponding charge account by utilizing drop down related actions box.
11. The top right of the page totals your expenses.

Personal	Cash Advance Applied	Reimbursement	Total
0.00 USD	0.00 USD	0.00 USD	0.00 USD

12. **Submit** or **Save for Later** (saved under **Recent** on Expenses page).
13. Utilizing the  Print Icon in the upper right hand corner, print a copy of the expense report. Once approved and a notification is received, attach this printout with all original receipts and send to Accounts Payable. **NOTE: Reimbursements will not be processed until original documentation is received by Accounts Payable.**

VIEW AN EXISTING EXPENSE REPORT

From the Expenses application .

1. Click the **Expense Reports** under View.
2. Filter your request by status and date.

EDIT AN EXISTING EXPENSE REPORT

1. Follow instructions for viewing an expense report.
2. After selecting appropriate expense report to modify, select **Change/Edit Expense Report**.
3. Complete changes and click **Submit** and **Done**.



Note: Review the Travel Regulations for your University and the State of Louisiana prior to submitting travel expense report. Also, Out of State Travel and International Travel have specific requirements. Speak to your supervisor or Accounts Payable if you have questions.

Alternative method: If you selected Copy a Previous Expense Report or Create from a Spend Authorization, information is available to assist in filling out expense report lines. Also, expense report lines can be added or imported from an existing record. Based on expense reporting rules, attachments may be required for expense report lines. Simply drag and drop files or select files for attachments.