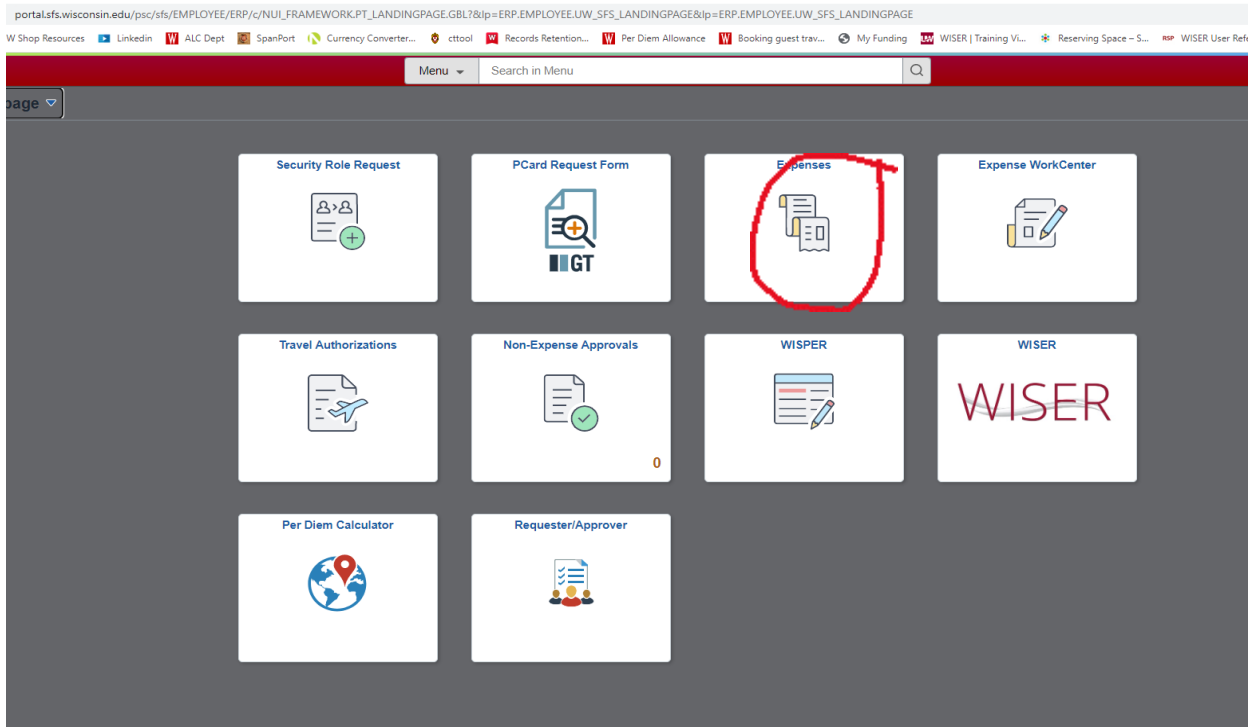


Creating an Expense Report

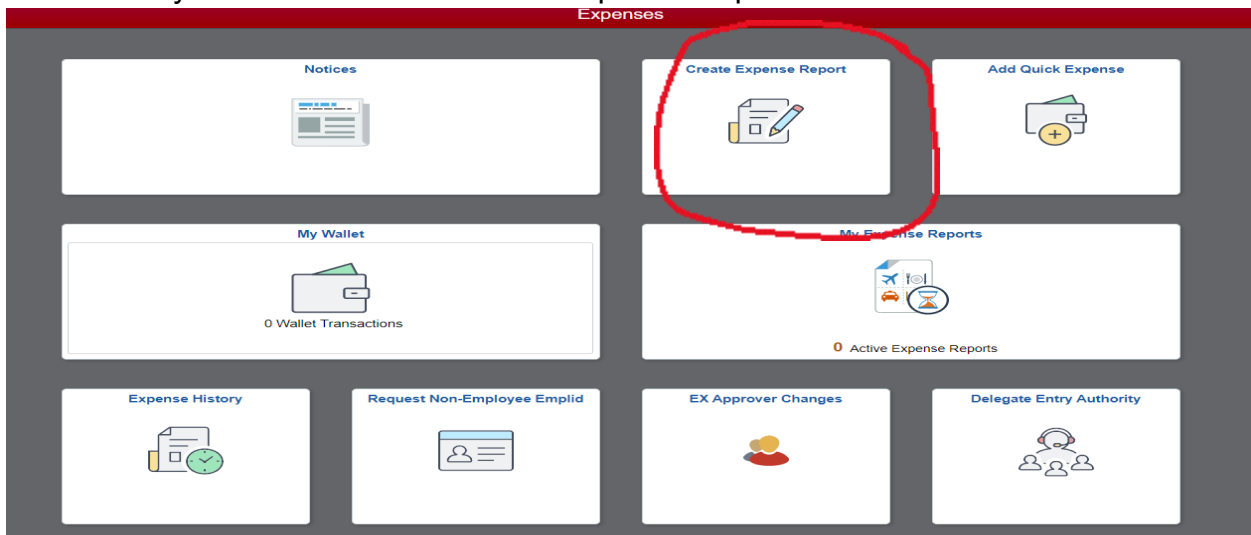
https://portal.sfs.wisconsin.edu/psc/sfs/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL

You MUST apply for reimbursement within 90 days of your event. Reports submitted after 90 days WILL NOT get reimbursed.

1. Click on the link above to go to this starting page. To start an expense report, click on the Expenses Tile.



2. Next you will click on the Create Expense Report Tile.



Creating an Expense Report

https://portal.sfs.wisconsin.edu/psc/sfs/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL

- On this page, you will begin filling in your information. Anything with an * is required.

Business Purpose:	Choose the appropriate purpose from the drop down.
Description:	Enter a brief description of your purpose.
Default Location:	Enter the location of your event.
Reference:	Select the category of the travel (INSTATE, OUTSTATE, FOREIGN, NONTRAV).
Date of Departure:	Enter the date you are leaving.
Date of Return:	Enter the date you are returning.

- Add attachments by clicking on Attachments section in the upper right. (Attachments must be in PDF or JPEG format)

The following must be added to the Attachments:

- Proof of the event (Conference agenda, email invitation/confirmation, etc.)
- Receipts (please provide conversion if in foreign currency)

When you are finished adding attachments, click on Done.

Creating an Expense Report

https://portal.sfs.wisconsin.edu/psc/sfs/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL

5. Under Accounting Defaults, put in the funding string you wish to use for this expense. If you are unsure about this string, please contact Tracy Deavers.

Fund=131 or if you are using a different fund, please enter
Dept= 488507 for Spanish and Portuguese or 482107 for Asian Languages and Cultures
Program=4
Class=Keep this empty
Project=If you are using research awards, you will have a different fund number, department, and will need to add the project number. Please ask Tracy Deavers if you have questions on using a research award.

6. Click on JUSTIFICATION

The Justification is critical. The number one reason expense reports get returned is because the Justification does not contain how the purchase benefited your research and/or the University.

Follow the template below to construct your Justification:

“I traveled to the national conference for linguistics in Portugal on May 5-9, 2023. As a professor of linguistics, specifically in Portuguese, attending and presenting at this conference helped me stay up to date on the most current research and network with colleagues who share similar research interests. Lunch was provided by the conference. Airfare paid on Tracy Deavers P-Card.”

Items that are in **Bold**, help to provide necessary background and benefit to your position and/or the University. Please replace bold text with the equivalent information for your own reimbursement request.

7. Adding Expenses:

The screenshot shows a web-based form for creating an expense report. The 'General Information' section includes fields for Business Purpose (Business), Description (Example Expense Report), Default Location (MILWAUKEE, WI), Reference (INSTATE), Date of departure (04/17/2020), and Date of return (04/17/2020). There are also tabs for Attachments, Accounting Details, and Justification and Supporting Details. The 'Expense Details' section shows 'No expenses have been entered' and a green '+ Add Expense' button, which is circled in red. A 'Quick-Fill' button is also visible.

Click on the Green +Add Expense Box to begin adding your expenses.

Creating an Expense Report

https://portal.sfs.wisconsin.edu/psc/sfs/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL

Once you complete a line, you can add additional claims by clicking on the ADD button on the left side of the screen.

8. Once you have entered all your expenses, you are ready to submit. Press the gray REVIEW AND SUBMIT button in the upper right. This will take you to the Expense Summary page.
9. Once you review the Expense Summary page, click SUBMIT in the upper right. If you would like to save your expense report for modifications, click the green SAVE button.

Helpful Hints

- You must apply for reimbursement within 90 days of your event. Reports submitted after 90 days will not get reimbursed.
- Expense reimbursements must be submitted within 90 days of:
 - The end of the trip (for travel-related expense reimbursements)
 - The date of the purchase (for non-travel related expense reimbursements)
 - The end date of the course (for tuition or job training expense reimbursements)
- Expense reimbursements sent back to the traveler for correction must be resubmitted within 90 days of being sent back.
- Travelers may seek reimbursement for airfare, registration fees, lodging, and vehicle rental reservation guarantees at the time payment is made. All other travel expenses are reimbursable after the trip is complete.
- Keep your documents for reimbursement in a folder that you can easily find and attach.
- A meal and lodging per diem will be paid to you for your dates of travel. The per diem is determined by your travel location and dates of travel.
- [Per Diem Calculator](#)
- If you are claiming mileage, be sure to attach a map showing your starting and ending points as well as the mileage according to the map.
- When entering an expense, always put in the date of purchase, not the date of the event.
- For more information on Getting Reimbursed visit <https://businessservices.wisc.edu/travel-reimbursement/getting-reimbursed/>
- More detailed help on reimbursements such as airfare and lodging are available [here](#)
- If you need to convert receipts from foreign currency to US dollars, use [this](#) site.