

e-Reimbursement Training

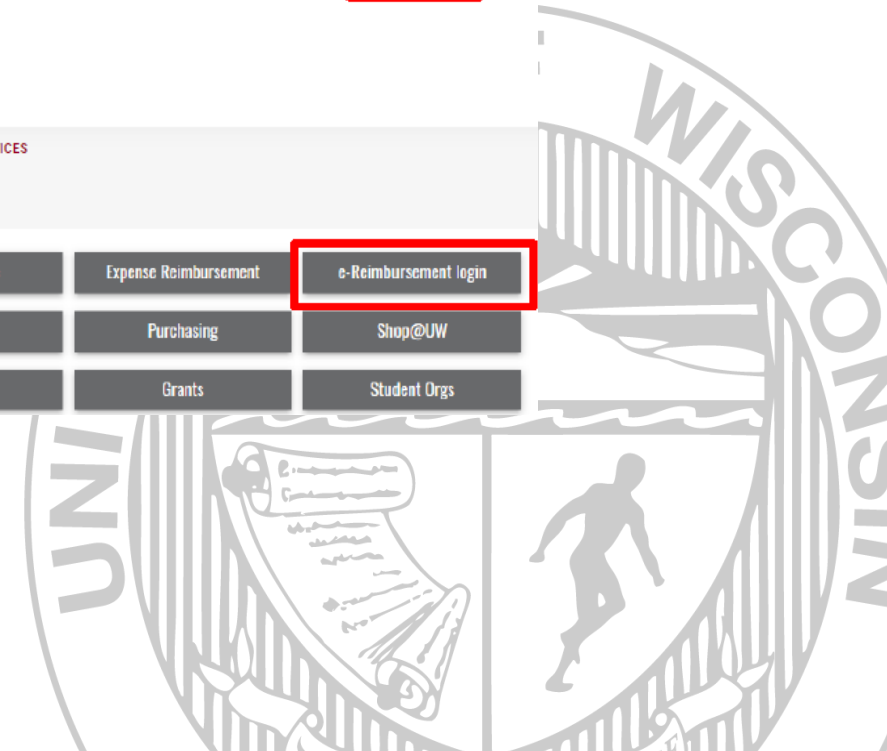


Login

- Open an internet browser
- Go to the UWL Website Homepage
 - Click on A-Z directory
 - Scroll down and click on Business Services
- At the Business Services Homepage
 - Click on e-Reimbursement login
- Logging into e-Reimbursement
 - Select UW-La Crosse
 - Click on Go
 - Enter your NetId and Password

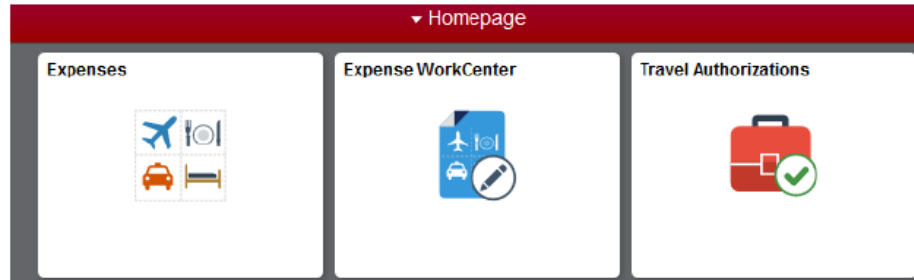
Business Services

Travel Information	UWTravelWise	Expense Reimbursement	e-Reimbursement login
Food	PCards	Purchasing	Shop@UW
Cashier's	Forms	Grants	Student Orgs

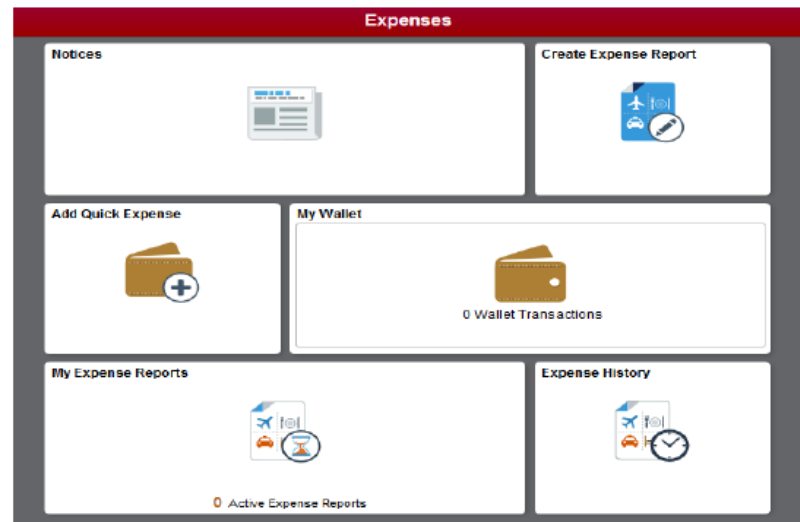


Homepage & Navigation

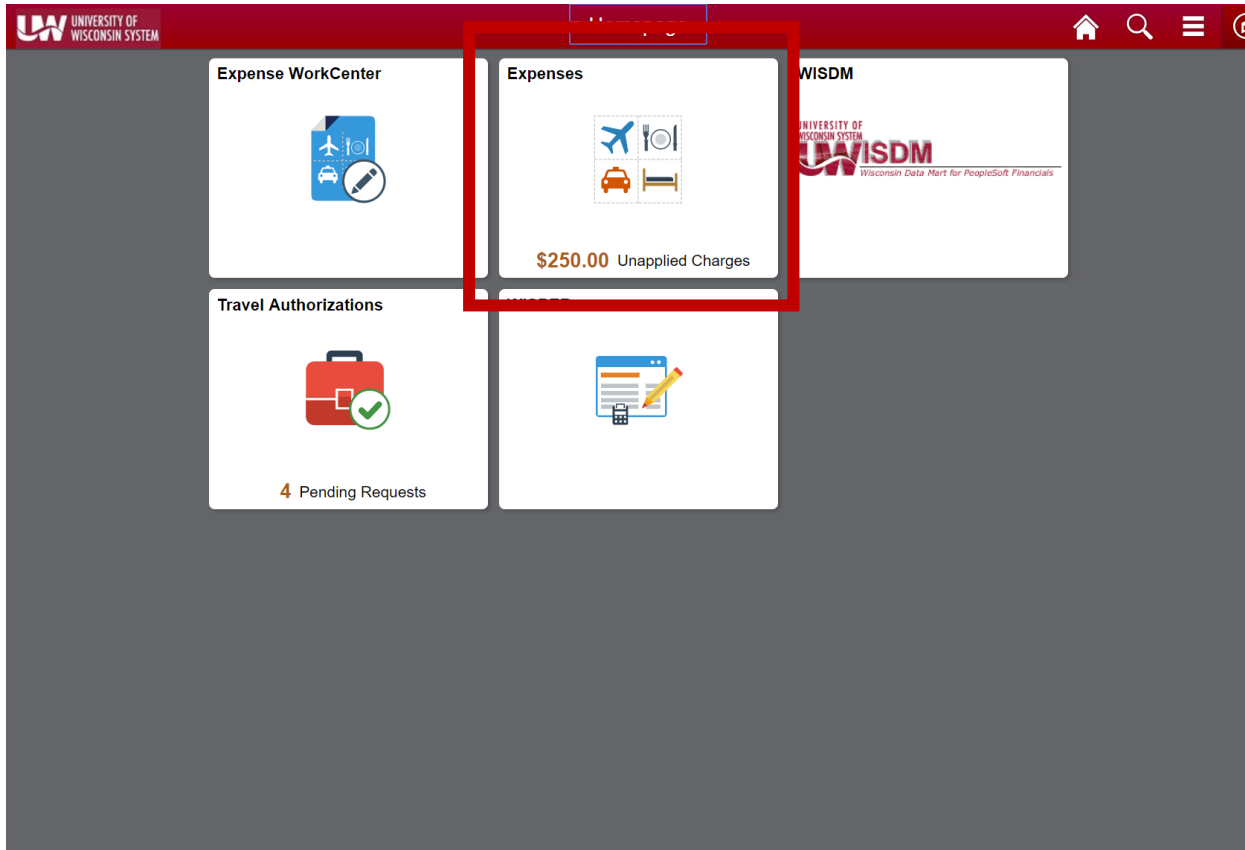
- Homepage:



- Contains Navigation Tiles
 - When clicked on, they take you to a navigation tile collection



Expense Report



- Use the Expenses tile to get into Travel and Expense functions



Expense Report

- From the Expense tile, you can
 - Enter a new expense report
 - Enter expenses into your wallet for later use
 - View Expense History
- To get started click **Create Expense Report**

The screenshot shows the SFS Expense Module interface. The top navigation bar includes a 'Homepage' button, the title 'Expenses', and navigation icons (home, search, menu, refresh). The main content area is divided into several sections:

- Notices:** A welcome message for new users, accompanied by a green car icon.
- Create Expense Report:** A button with a blue icon representing travel and expenses, highlighted with a red box.
- Add Quick Expense:** A button with a brown wallet icon and a plus sign.
- My Wallet:** A bar chart showing the amount of transactions. The y-axis is labeled 'Amount' and ranges from 0 to 300. A single blue bar represents 'REGFEES' with a value of approximately 250. Below the chart, it says '1 Wallet Transactions'.
- My Expense Reports:** A bar chart showing the number of reports and their amounts. The left y-axis is '# of Reports' (0 to 30) and the right y-axis is 'Amount' (0K to 6K). Two bars are shown: 'Returned' (approx. 8 reports, 2K amount) and 'Pending' (approx. 32 reports, 4K amount). Below the chart, it says '40 Active Expense Reports'.
- Expense History:** A button with a blue icon representing travel and a clock.

Create Expense Report

- **Business Purpose:** should be Business
- **Default Location:** Destination location
- **Reference:** Either INSTATE or OUTSTATE
- **Attachments:** Should include Mileage maps and No campus office letter
- **Accounting Defaults:** Should be 102-6-030120
- **Justification:** Description of your travels

← Expenses
Expense Report
🏠 🔍 ⋮ 🚫

Report NEXT
 SCOTT PETERSON

General Information

*Business Purpose	Business	▼
*Description	January - Mileage - STS	
*Default Location	LA CROSSE, WI	🔍
*Reference	INSTATE	🔍
Date of departure	01/01/2022	📅
Date of return	01/01/2022	📅

📎 Attachments >

🗃️ Accounting Defaults >

Justification (IS MISSING) 📄 0 >

General Information

Creation Date 01/12/2022 SCOTT PETERSON

Updated on 01/12/2022

Expense Details

Expense Report Action	<div style="background-color: #f0f0f0; padding: 2px;">></div>
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Custom Funding (UWLAC/030100/102)



Expense Details

- Expense Report Action:
 - Add Expenses Lines

Expense Details

Expense Report
Action

▼

- Add Expense Lines
- Add from My Wallet
- Add from Quick-Fill
- Copy Expense Report

Custom Funding (UWLAC/030100/102)



Expense Entry

- **Date:** The day of travel
- **Expense Type:** Mileage
- **Description:** Starting location to destination
- **Transportation ID:** Always use Standard Rate even when your round trip is greater than 100 miles
- **Miles:** Round trip mileage
- **Reimbursement Method:** Personal Funds
- **Originating Location:** Home or Office location
- **Destination Location:** School location
- **Non-Reimbursable = NO**

Expense Report
Expense Entry

January - Mileage - STS

SCOTT PETERSON

[Save](#) [Review and Submit](#)

Last Saved 01/12/2022 10:19AM

Mileage - 01/01/2022

*Date

*Expense Type [Help](#)

Description

Mileage

*Transportation ID

Transportation Type

*Miles x

Payment Details

*Reimbursement Method

*Amount

Additional Information

*Originating Location

*Destination Location


Accounting 1 >


Exceptions

Non-Reimbursable No





Add Additional lines

- To add an additional expense click the **Add** button
- To copy an expense line click on the **More** button
 - Select the line to copy and click Copy
 - Input new date

January - Mileage - STS 


SCOTT PETERSON 


Total (1 Item) 15.44 USD

 Add
  Delete
  Filter
  More






▼ Saturday, January 01, 2022

Mileage	15.44
123 Holmen Lane, Holmen WI to La Crosse Central High School	USD

January - Mileage - STS 

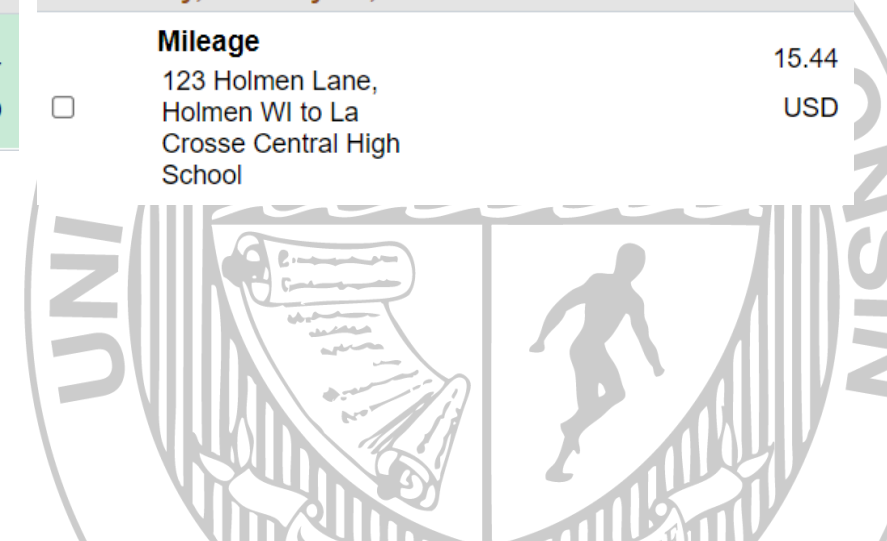
SCOTT PETERSON 

Total (1 Item) 15.44 USD

 Select All
  Quick-Fill
  Copy
  Delete
  More
 0 Selected

▼ Saturday, January 01, 2022

<input type="checkbox"/>	Mileage	15.44
	123 Holmen Lane, Holmen WI to La Crosse Central High School	USD



Submitting Expense Report

- Once you have entered all your expense lines, you can either Save the report for later or Review and Submit.
- **If you did not enter justifications/support, it will force you to enter this.**



My Expense Reports - Status Review

< My Expense Reports

EXUSER01-Stefanie Employee ✔
 EXUSER01

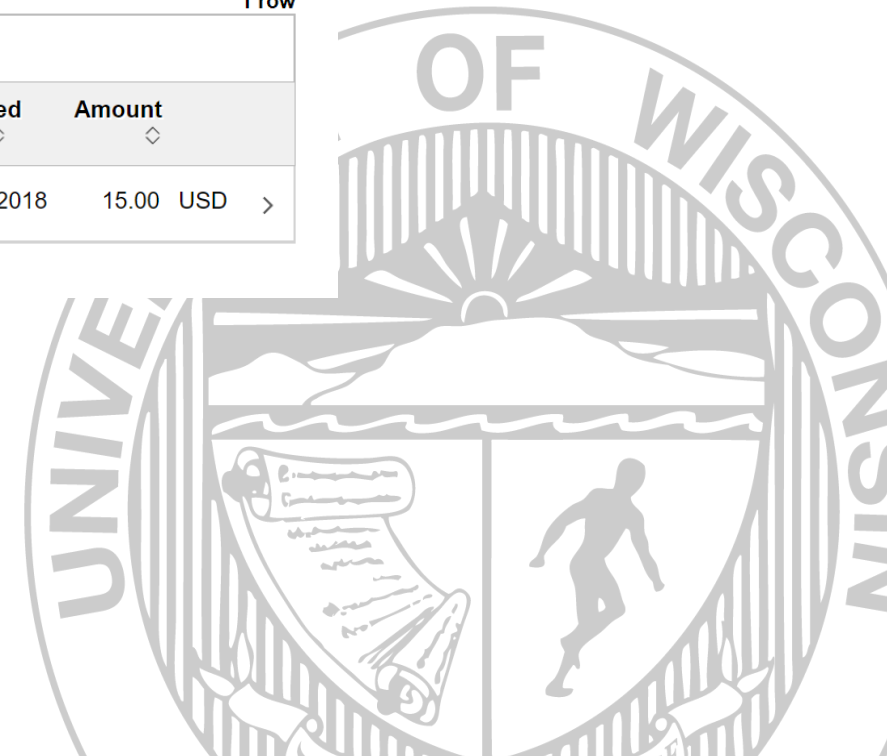
Returned	8
Not Submitted	33
Awaiting Approval	1
Pending Payment	0
View All	42

Awaiting Approval 1 row

Create Expense Report

Actions	Description	Report ID	Status	Approver	Role	Updated Date	Amount
✔	associate ta	0000479627	Submitted for Approval	EXMRG85C Employee	Expense Manager	06/25/2018	15.00 USD >

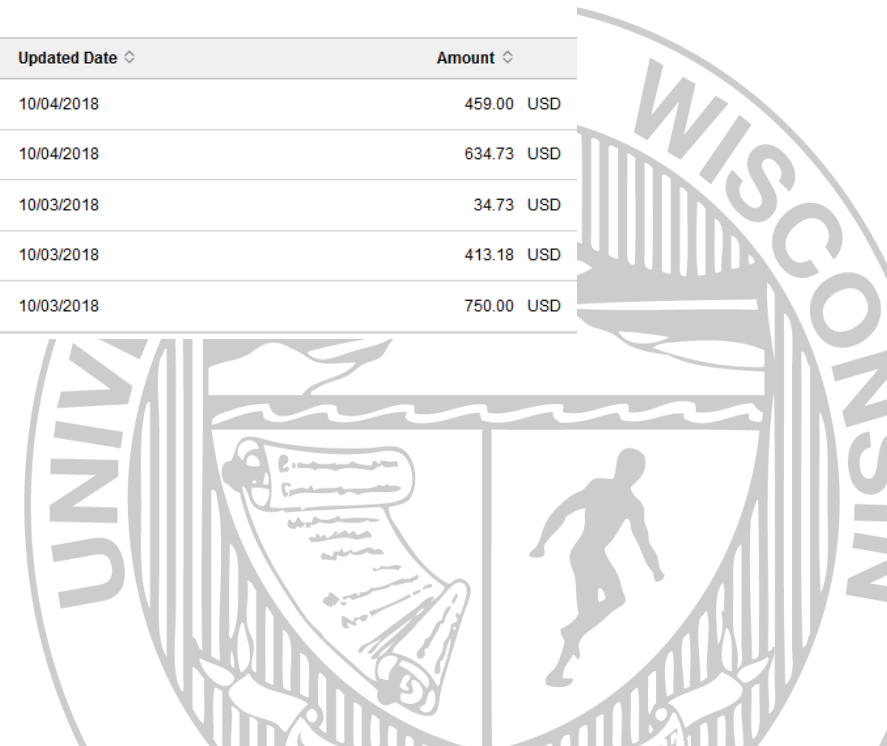
- You can view all your expense reports from this summary screen. Clicking on the heading will show a list of items in that category.
- You can take action on them by clicking on the arrow under the action column of the report. Items not submitted can be opened and reviewed & submitted. Items awaiting approval can have reminder notifications sent.



My Expense Reports

Actions	Business Purpose	Report ID	Updated Date	Amount
<ul style="list-style-type: none"> Copy To New Report Delete Report Send Notification 	Conference	0000609314	10/04/2018	459.00 USD
	Conference	0000609311	10/04/2018	634.73 USD
	Business	0000609289	10/03/2018	34.73 USD
	Conference	0000609298	10/03/2018	413.18 USD
	Non-Travel	0000609306	10/03/2018	750.00 USD

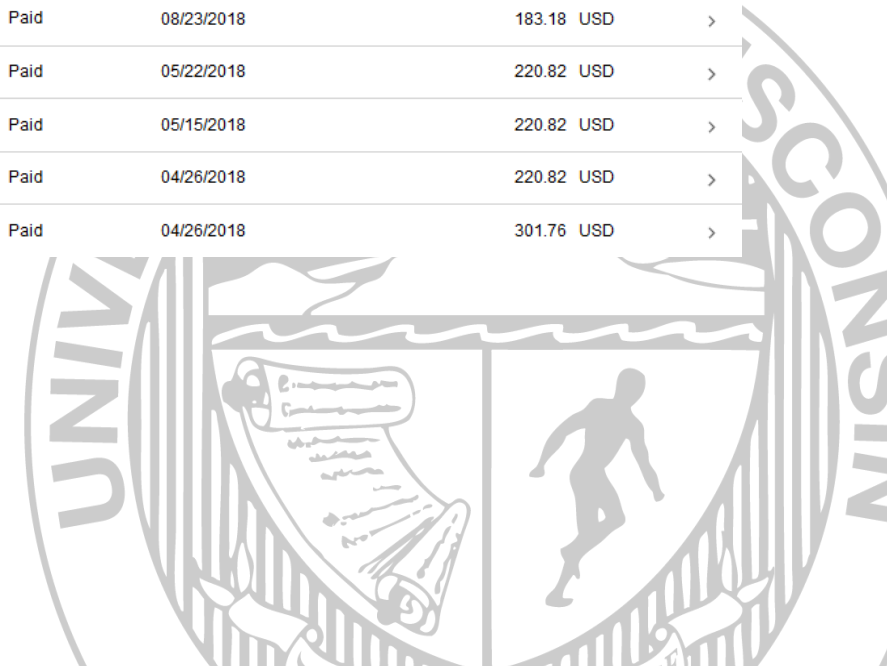
- Copy to New Report – will create a new report based on an existing report which can then be modified.
- Delete Report – will allow you to delete a report in your queue.
- Send Notification – allows you to send a message regarding the report selected.



Expense History

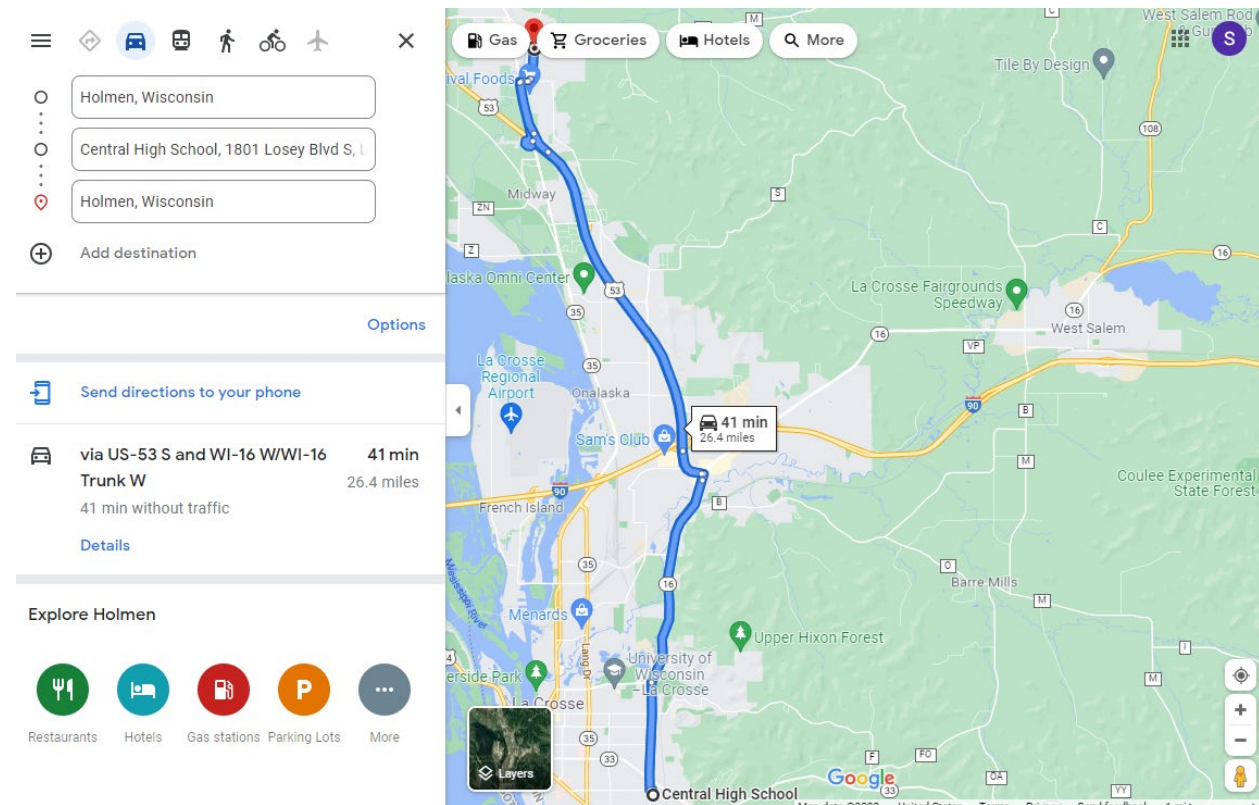
Actions	Business Purpose	Report ID	Status	Updated Date	Amount
<ul style="list-style-type: none"> Copy To New Report Send Notification 	Conference	0000600342	Paid	08/23/2018	183.18 USD
	Professional Development	0000577246	Paid	05/22/2018	220.82 USD
	Professional Development	0000571176	Paid	05/15/2018	220.82 USD
	Professional Development	0000565179	Paid	04/26/2018	220.82 USD
	Conference	0000562214	Paid	04/26/2018	301.76 USD

- Copy to New Report – will create a new report based on an existing report which can then be modified.
- Send Notification – allows you to send a message regarding the report selected.



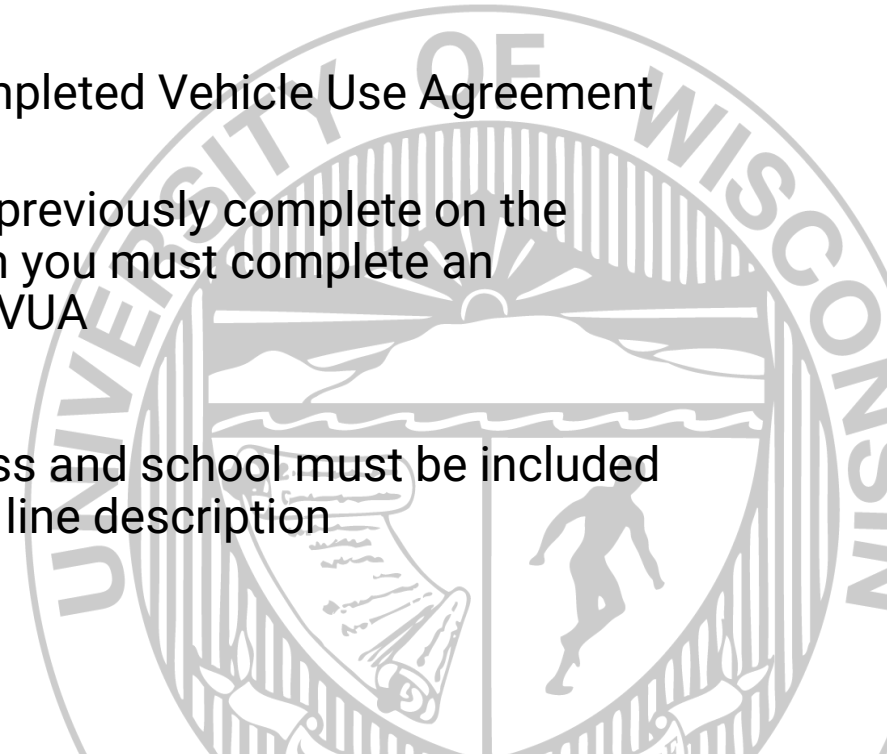
Mileage Maps

- You can add an additional destination, so it gives you round trip mileage
 - Not required as you may just double your one-way route
- Must use most direct route
- File type should be .pdf or .jpg
- Save them in a folder to be used on your next expense report



Recap

- It is the responsibility of the Supervisor to fill out and complete their mileage reimbursement
- Must upload as attachments:
 - Mileage Maps (Google Maps or MapQuest)
 - Save your maps to reuse on your next report
 - File type should be .pdf or .jpg
 - No on campus office letter (if applicable)
- You are now able to input the exact mileage
 - Must use most direct route
- Expense Reports must be submitted within 90 days of trip completion
- Must have completed Vehicle Use Agreement (UVA)
 - If you had previously complete on the paper form you must complete an electronic VUA
- Starting address and school must be included in the expense line description



Questions

