

Shared Hotel Expense Types

The **Shared Hotel** expense type must be itemized the Expense Report (ER) to distinguish the separate charges (e.g. room rate, taxes, parking).

| Step | Task |
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| 1. | Click the Expense Report icon. |
| 2. | Complete the Document Header information. |
| 3. | Click Continue . |
| 4. | Select an Expense Type (e.g. Lodging) from the menu. |
| 5. | Click Add Expense . |
| 6. | <p>Enter information in the fields under Standard Information.</p> <ol style="list-style-type: none"> 1) Click Add Self only if you shared lodging. 2) Click Add under the Name of Shared Employee section. 3) Click New under the Search tab. 4) Enter the Name, Type, Affiliation, and Company of the guest. 5) Click Save. 6) Click Add. 7) Click Save again. 8) Repeat steps 3 through 7 for each <i>new guest</i>. <p>NOTE: To add a recently used guest, complete these steps:</p> <ol style="list-style-type: none"> 1. Click Add. 2. Click the Recently Used tab. <p>NOTE: Click Other documents if it is not selected.</p> <ol style="list-style-type: none"> 3. Select the check box next to the guest's name. 4. Click Add. 5. Click Save located at the bottom of the page. <p>Select a C-FOP from the Project menu under the Charge Code Allocations section.</p> |
| 7. | <p>Click the View/Add Itemizations icon (to the right of the Itemizations field) in the Standard Information section.</p> <ol style="list-style-type: none"> 1) Select an Expense Type from the menu. 2) Click Add Expense. 3) Change the amount to the portion being itemized to this expense type (the full unitemized amount will default in this field). 4) Click Save. 5) Repeat steps 1 through 4 for all Expense Types. <p>Click the Finish Itemization button.</p> |
| 8. | Enter a note in the Notes field, if necessary. |
| 9. | Click Save . |
| 10. | Repeat steps 4 through 9 to add additional Expense Types . |
| 11. | Attach any receipts if necessary. For more information on how to attach receipts, review the Browse and Attach Receipts job aid. |



| Step | Task |
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| 12. | Click Submit . |
| 13. | Read the certification information, and click View Policy if necessary. |
| 14. | Click Continue . |

For more information, refer to the **Create an Expense Report (ER)** job aid.