Business Meals and Shared Hotel Expense Types

The *Business Meals* and *Shared Hotel* expense types require additional steps on the Expense Report (ER). These expense types must be itemized to distinguish the separate charges (e.g., food, tip/tax, parking, guest names). For business meals with more than 20 guests, use the *Other Meals / Reception (20 or More People)* expense type.

Step	Task
1.	Click the **Expense Report** icon.
2.	Complete the **Document Header** information.
3.	Click the **Continue** button.
4.	Select an **Expense Type** (e.g., Business Meals - Dinner) from the menu.
5.	Click the **Add Expense** button.
6.	Enter information in the fields under **Standard Information.** 1) Click the **Add Self** button only if you were present at the meal. 2) Click the **Add** button under the **Guest Name** section. 3) Click the **New** button under the **Search** tab. 4) Enter the **Name, Type, Affiliation,** and **Company** of the guest. 5) Click the **Save** button. 6) Click the **Add** button. 7) Click the **Save** button again. 8) Repeat steps 3 through 7 for each *new guest*. **NOTE:** To add a recently used guest, complete these steps: 1. Click the **Add** button. 2. Click the **Recently Used** tab. **NOTE:** Click **Other documents** if it is not selected. 3. Select the check box next to the guest's name. 4. Click the **Add** button. 5. Click the **Save** button located at the bottom of the page. 9) Select a **C-FOP** from the **Project** menu under the **Charge Code Allocations** section.
7.	Click the **View/Edit Itemizations** icon (to the right of the **Itemizations** field) in the **Standard Information** section. 1) Select an **Expense Type** from the menu. 2) Click the **Add Expense** button. 3) Enter the **Amount** (total charge). 4) Click the **Save** button. 5) Repeat steps 1 through 4 for all **Expense Types.** 6) Click the **Finish Itemization** button.
8.	Enter a note in the **Notes** field, if necessary.
9.	Click the **Save** button.

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.
12.	Click the **Submit** button.
13.	Read the certification information, and click **View Policy** if necessary.
14.	Click the **Continue** button.

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