

Create an Expense Report (ER)

Step	Task
1.	Click the Expense Report icon.
2.	Complete the Document Header information. <ol style="list-style-type: none"> 1) Enter a unique report title in the Report Title field. 2) Select a purpose from the Purpose menu. For more information, refer to the <i>Purpose of the Document</i> job aid. NOTE: Depending on the purpose that is selected, there may be additional fields that require more information. 3) Enter a business purpose or justification in the Business Purpose/Justification field. 4) Select an affiliation from the Payee Affiliation menu.
3.	Click the Continue button.
4.	Select an Expense Type from the menu.
5.	Click the Add Expense button.
6.	Enter information in the fields under Standard Information . The fields that display may vary depending on the Purpose.
7.	Select a C-FOP from the Project menu under Charge Code Allocations .
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 <i>Browse and Attach Receipts</i> job aid.
12.	Click the Submit button.
13.	Read the certification information, and click View Policy if necessary.
14.	Click the Continue button.

Additional information:

- The process of submitting a request for employee travel and miscellaneous reimbursement or non-purchase order payments to vendors is the same—start by creating an Expense Report (ER).