The Expense Report (ER) and Travel Plan (TP) Workflow

The process of submitting a request for Travel and Miscellaneous Reimbursements, Non-Purchase Order Payments to Vendors, or Travel Plans for Pre-Trip Approval (optional) is the same.

1. Create an ER or TP
2. Select a Purpose (e.g., Advances or Payments)
3. Select the Expense Type
   (This is determined by the Purpose that was selected. Repeat this step to add additional expenses.)
4. Attach receipts and Supporting Documentation
5. Submit ER or TP