Use Chrome or Firefox (Do not use Internet Explorer).

1. From the University of Miami website home page, under "Tools" or under "Tools and Resources", select "Workday".
2 Select "Expenses"
Select "Create Expense Report"
Anything with a red asterisk * must be filled in. Most other items without a red asterisk are optional and should be left blank.

4. **Creation Options** defaults to "Create New Expense Report." Leave this as it is.

5. **Company** defaults to "200 Academy." Leave it as it is.

6. **Expense Report Date** should be left to today's date (the day you input this expense report).

7. Fill in your **Program** Worktag Driver (a.k.a. account number), unless you are being reimbursed from a grant or other type of account. In that case, fill in the **Grant**, **Gift**, or **Project** Worktag.

**Program Worktag Driver (Account #)**

- PG003689 - MSC Undergraduate Program - Field Trips
- PG003671 - MSC Student Lab Supplies/Expenses - Last minute supplies (emergencies only).
- PG000485 - UGalapagos

Created by Ruth Goodin 7/19/2019 - RSMAS Undergraduate Program
8 Cost Center, Legacy Value, and Additional Worktags auto-populate. Leave these as they are.

9 The Enable Tax box defaults to having a checkmark in it. Leave it checked.

10 Press the "OK" button.
Select **Business Purpose** from dropdown menu.
Elaborate on Business Purpose. Include any details that may be helpful to explain why you are requesting reimbursement.
Add all Attachments

Always check this box on every screen.

Do not add attachments here. Use the main "Attachments" tab (top left of screen).
After you have selected the "Attachments" tab above (toward the top left of the screen), select and add all of your attachments here.

After you have added all of your attachments, go back to the Expense Report Lines tab.
15 Type in **Date** of expense (or click on calendar icon to find date).

16 Choose **Expense Item** from the dropdown menu.
NOTE: For some "Expense Types" or item types, such as hotel and airfare, additional boxes requesting additional information will pop up on the right-hand side of the screen.

Choose Expense Item from the dropdown menu.
Be sure to fill in any **Business Purpose** or **Business Reason** text boxes.
Program, Cost Center, Legacy Value, and Additional Worktags should auto-populate from the information entered in Step 7.

Leave these as they are.
Select the + Add button to add more expenses. Follow steps 15-21.
Be sure to fill in any boxes with a red asterisks *. Airline carrier, flight departure dates, return dates, and class of flight must be filled in. (Be sure to attach your detailed flight itinerary).

**AIRFARE COMPARISON:**
If you are going on a business trip and would like to go a day or two (or more) early, or stay a day or two (or more) late, you must include an airfare comparison. One airfare must show the days of travel just for the trip, and the other airfare must show the days of travel for the extra days. Both flight itineraries (with all of the details) must be attached to the expense report.
If the hotel you are staying in is not listed in the drop-down menu, choose "Hotel-Other".

If the Destination is not listed in the drop-down menu, choose the nearest large city closest to your destination.

Be sure to check this box on each Expense Item page.

**HOTEL:** Date of Arrival to hotel, departure date, number of nights in hotel, and name of hotel brand/company must be filled in. **All of these details must show on your receipt.**
You must use per diem for the entire trip reimbursement.

If you would prefer to use food receipts instead, you must use food receipts for the entire trip reimbursement.

If you are using per diem, and there is a particular meal where other guests joined you, and you would like to be reimbursed, create a separate expense report for it.

You will be taken to the Per Diem Travel Journal on the following page:
Under "Eligibility," fill in 12 hours for the first day and last day of travel (no matter what time you leave or return from your home). This will calculate at 75% of per diem. The other days will pre-populate to 24 hour days. Leave those at 24 hours each.

You must include a printout of the applicable GSA rate under the attachment tab (Step 13). Domestic per diem rates can be found at: https://www.gsa.gov/travel/plan-book/per-diem-rates. Foreign per diem rates can be found at: https://aoprals.state.gov/web920/per_diem.asp
Under "Expense Item," select "By Expense Item Group," "Other," then, "Other Employee Domestic Travel" or "Other Employee Foreign Travel."
AFTER YOU PRESS THE "SUBMIT" BUTTON, **WRITE DOWN THE ER-00000XXXXX NUMBER** SO YOU WILL BE ABLE TO FIND IT LATER.

Click the "Details and Process" tab to see who is next in line to approve this expense report.