Create an Expense Report (ER)

Step	Task
1.	Click the **Expense Report** icon.
2.	Complete the **Document Header** information**.** 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 *Purpose of the Document* 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 *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.

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).