



Create an Expense Report on behalf of an Employee (Expense Initiator)

Individuals who have been assigned the Expense Initiator Role in Workday have access to the **Create Expense Report for Worker** task. This task allows those with this role to create an expense report on behalf of another employee without the need for a delegation to be set up within Workday. This role is assigned at the Enterprise level and can create expense reports on behalf of any individual within the Enterprise.

Expense reports created by a user with this role will route to the Subject (Pay to) of the report for their review and approval before it is sent through the remaining approval process. If the Subject (Pay to) happens to be an Approver, they will not receive the approval step for their own expenses.

Create Expense Report for Worker

1. Search for and select the **Create Expense Report for Worker** task.
2. Select the **employee you are creating the expense report on behalf of** as the Pay To. This is the employee requesting reimbursement.
3. Select either **Create New Expense Report** or **Copy Previous Expense Report**. Your selection determines what information displays and what worktags populate in the new expense report.
4. Type the **title** of your report as the **Memo**.
5. Choose the appropriate **Company**.

Note: If you have expenses for cost centers that are within different Companies (i.e. VHS and VUMC), please create a separate expense report for each company's expenses.

6. The **Date** will pre-populate with the date you are filling out the report.

7. Select the appropriate **Business Purpose**.

8. If this appears, make sure the appropriate **Company** is selected.

9. Update worktags if needed, then select **OK**.

Note: If you have VUMC card charges to expense, scroll down and click **Include** before selecting **OK**.

View the remaining steps to create and submit an expense report [here](#).

This **Create Expense Report** task should continue to be used if you are creating your own expense report. Instructions for this process can be found [here](#).

Search results for 'create expense report' showing two tasks: 'Create Expense Report Task' and 'Create Expense Report for Worker Task'. The second task is highlighted with a red box and a green circle with the number 1.

Form fields for 'Create Expense Report for Worker':

- Pay To:** Employee: Artie Choke (0123456) (Step 2)
- Creation Options:** Create New Expense Report, Copy Previous Expense Report (Step 3)
- Memo:** Hotel expenses from SHRM Conference attended from 6/11-6/14. (Step 4)
- Company:** Vanderbilt University Medical Center (Step 5)
- Expense Report Date:** 06/14/2023 (Step 6)
- Business Purpose:** Conference (Step 7)
- Company on Expense Line:** Vanderbilt University Medical Center (Step 8)

Worktag selection screen with fields for Grant, Gift, Project, Program, Cost Center, Fund, Operating Entity, and Additional Worktags. The 'Additional Worktags' field is highlighted with a red box and a green circle with the number 9.

Available worktags will be based on the Employee selected as the **Pay To** (Step 2 above) and will automatically populate. These can be changed if needed.



Approving an Expense Report created on your behalf (Pay-To Employee)

After an Expense Initiator has submitted an expense report on your behalf, you will receive a to-do item in your Inbox. Opening the item will allow you to edit, approve, send back, or add approvers to the expense report.

After reviewing and making any updates if needed, you must select **Approve** to send the report through the rest of the approval process to be reimbursed.

Pay-to Employee Inbox Approval

1. Open your **Inbox**.
2. Select the **expense report** that was created on your behalf.
3. Select **Edit** to make any changes to the report as needed, then select **Approve** once the report is ready to be submitted.

Note: An itemized receipt is required for all expenses of \$75 or more

Additional details around expense report approvals can be found [here](#).

1

2

3

QUESTIONS?

Please email BusinessEducation@vumc.org.