





Create an Expense Report : Mileage

Expense Reports are created for business related mileage reimbursement. Follow the steps below to create an expense report, including creating a header and entering your expenses.

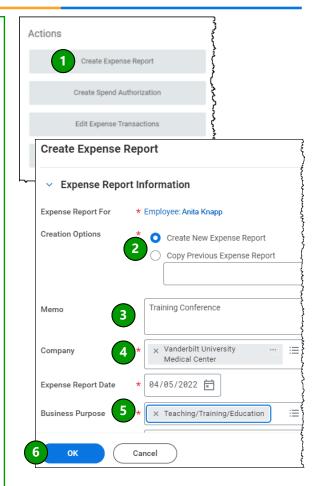
CREATE AN EXPENSE REPORT HEADER

From the Expenses application:

- 1. Under Actions, choose Create Expense Report.
- 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.
- 3. Type the **title** of your report in the **Memo field**.
- 4. The **Company** field populates with your default company. If you have expenses for multiple companies, you will need to create separate expense reports for each company's *(see list on page 3)* expenses.
- Ensure the appropriate Business Purpose, Cost Center,
 Fund, and Operating Entity are selected.

Note: The Cost Center/Operating Entity/Company to be selected is associated with the expense and not (necessarily) associated with the cost center of your payroll.

6. Select **OK**.

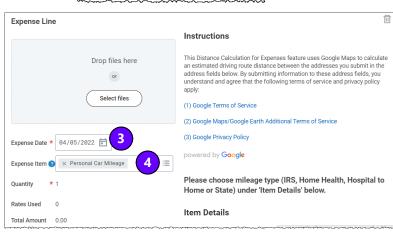


ENTER MILEAGE EXPENSE

- From the Expense Report Header, select the Expense Lines tab.
- Select Add.
- 3. Enter the **Date** of the mileage in the Date field.
- 4. Enter **Personal Car Mileage** in the Expense Item field.

Once the Personal Car Mileage expense item is entered, the amount field will not longer be available for editing and the Google Maps Distance Calculator will open on the right side of the page.





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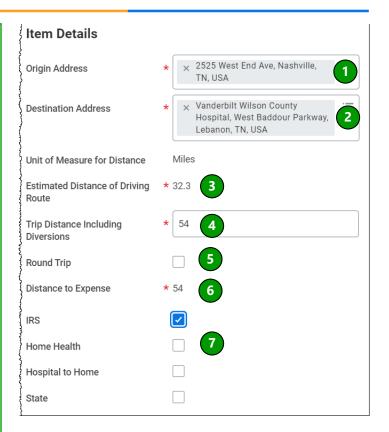


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ENTER MILEAGE DETAILS

Enter trip details in the Google Maps Distance Calculator fields under Item Details.

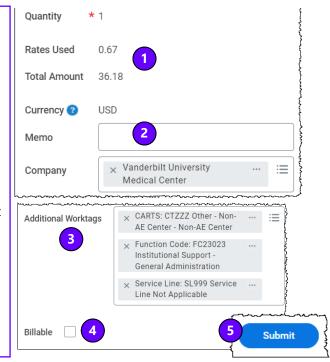
- 1. Enter the starting address in Origin Address.
- 2. Enter the Destination Address.
- The Estimated Distance of Driving Route based on Google Maps information built into Workday will calculate.
- If necessary, update the Trip Distance Including
 Diversions to include all stops and actual route taken.
- Check the Round Trip check box if your trip returned to the same Origin Address. Note that this will double the mileage in the Trip Distance Including Diversions box.
- 6. The Distance to Expense will display the total mileage based on distance and updates (see step 4) that will be used in the calculation for reimbursement.
- 7. Check the appropriate Mileage Type based on the business purpose of the travel. Note that IRS should be used unless the travel falls into one of the other specific purposes.



REVIEW AND SUBMIT

- The Expense Lines for Rate Used and Total Amount calculate based on Item Details entered.
- Enter details regarding distance updates added to the trip's Item Details in the Memo field.
- 3. Enter the **Date** of the mileage in the Date field.
- 4. Update any worktags as necessary. (Grant, Project, etc.)
- 4. If using a grant, the **Billable** box should be checked so that the Post-Award team can be notified to bill the sponsor.
- 5. Select Submit.

Note for Home Health: Enter total mileage for the period in the **Trip Distance Including Diversions** (see step 5 in Item Details) and attach mileage log using **Attach Receipt** at the top of the page.



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