Question	Answer
How to submit Concur Expense report for technical certification voucher reimbursement?	This type of expense report will be done in Workday going forward. Concur is only used for booking travel, not for any reimbursements.
How should meals be entered on grant-funded reimbursements? the meal category was not accepted, but catering was acceptable...	A new expnese category has just been added - Grant Business Meal.
How can a multi-center allocation be entered once for the entire submission, rather than being entered for every single line item?	If the report needs itemization, the allocation would need to be entered at the line item level
What option to select for technical certification exam voucher reimbursement (employee already paid for the voucher exam and passed)? And do I need to set up my bank info or it was transferred from Concur?	There are a couple of options that seem like good choices. Try "licensure/accreditation" or "professional development" as your expense types. Direct deposit info should have been transferred from our former systems, but you can double check by searching "Payment Elections"
If you have both a T&E card and a P-card, can you include charges on both cards on one expense report, or do they need to be kept separate?	Yes, you can put them both on the same report. You will check the box next to all Card Transactions (that populate at the bottom of the report) you want on the report. (If you have both a T&E card and a P-card, can you include charges on both cards on one expense report, or do they need to be kept separate?)
How do we get "Walk Me"?	Updating this response to mention there is a link to install it if you do not see WalkMe within this slide deck that will be posted to the Workday Training Hub.
I tried to use the "guide me" but after the first step, I could not advance it.	In some of the WalkMe, you will need to click "next" in some you will need to put data in the field as indicated.
I tried to use the "guide me" but after the first step, I could not advance it.	The first step in this WalkMe guide requires you to enter text in the "memo" field. Once you have done that, it should move on to the next step
If we are an expense delegate, how do we submit an expense report for others?	That needs to be delegated to you in Workday. Tjhere are training guides on the vumc.org/myworkday/training-hub webpage on delegation if you need assistance.
How do I submit travel expenses for the faculty that I support if I am not listed as their subordinate, and therefore can't be delegated? I am only listed in Workday under my direct boss, but I have been submitting travel for the other doctors I support for years in Concur.	Right now, this functionality is only possible with delegation. This request has been shared with leadership, and we'll communicate with users if there's an update to this approach.

Is the attachment tab where we would attach the International travel questionnaire?	yes, that is a good place to attach it.
If we are an expense delegate, how do we submit an expense report for others?	If it has already been delegated to you, try referencing this guide to see how to switch accounts and act on behalf of someone: https://www.vumc.org/myworkday/sites/default/files/public_files/Training/Performing_Delegated_Task_QRG.pdf
Is the attachment tab where we would attach the International travel questionnaire?	yes, that is a good place to attach it.
If you don't have any PCard purchases for a given month, how do you complete the expense report?	By selecting "Add" within the Expense LInes tab, you can add any additional expenses for a month that were not purchased with a PCard.
Expense reports and PCard.......Please be aware/remind everyone that Program/Grant, etc ID and Assignee ID does not auto populate. This must be filled in by the user if those are appropriate for the charge.	Correct! Also note that if using a grant, the 'Billable' box should be checked so that the Post-Award team can be notified to bill the sponsor
Can a single center and worktag allocation be entered once for the entire submission, rather than being entered for every single line item?	Yes, in the initial page of creating an expense report, you can add a driver worktag (Grant, Cost Center, Program, etc) that will default for expense lines.
Why does the cost center number disappear when you go back in to fill in the receipt?	You may try selecting "Save for Later" after you've entered the cost center number and then going back to add the receipt within the Attachment section.
Is the any initiative to get a role/access for admins that can have reports delegated to them across a department, regardless of their sup org so they can continue to support the faculty?	This request has been shared with leadership, and we'll communicate with users if there's an update to this approach. However, there is a pegasus ticket process for enhancement requests for Workday.
For Personal Car Mileage, how do you for example have one line with travel for the day that may include for example travel from am clinic to pm clinic and then back to am clinic without having to have a line item for each?	This is a Workday function that we are unable to fix at this time. We have submitted enhancement requests to have better mileage functionality!
What is the idea for inputting the personal expense if that is something not going to be reimburse for? Just out of curiosity?	All expenses must be accounted for to submit the expense report (so if you don't account for personal expenses then the balances don't match and you will receive an error).

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Do I need to set up my bank info or it was transferred from Concur?	Your bank data will have been transferred from our old systems. I believe your primary direct deposit account is what Workday uses by default for expense reports. Please check your banking details by typing "Payment Elections" in the Workday search.
Does the report have to match the total on the receipt? Could you not just put in for $475 of reimbursement and leave off what you don't want to get reimbursed?	If the amounts do not match, you will get an error.
Are the deadlines for approving Pcard charges in USBank the same for expense reports in Workday.	PCard and T&E card charges are due within 30 days of the expense being incurred
How do I delegate expense reporting to my program manager?	You can follow the steps to delegate a task with the quick reference guide linked below. https://d1vy0qa05cdjr5.cloudfront.net/8fb651dc-6f50-4f63-8ea3-82468310aae4/Public/Courses/2b09042c-8c31-401c-b376-5678f4fee448/WDES-102-Q2_Delegation_QRG-BD-QAFINAL.pdf
What about reimbursements for nonemployees? (visitors, candidates)	This would now be done through a Misc. Payment Request: https://www.vumc.org/myworkday/sites/default/files/public_files/Training/Miscellaneous%20Payee%20Request_QRG-BD-Final.pdf
Can you pull an expense report back if it has not been reviewed? For edits?	You will need to ask the approver to "Send Back" the report in their inbox instead of approving so that it can be edited. Note that if they select "Deny" the report will be deleted and will be unable to be recovered/edtied
PCard: I receive 3-7 charges per month from various publications. Submitted expense reports as Business Purpose = Other Then chose Books/Periodicals/Magazines Should I choose something different than 'OTHER'?	'Other' is the appropriate business purpose for expenses like "books, periodicals" etc.
For new providers/staff, do they have to set up banking information somewhere like concur use to before they are able to submit reports?	no need - banking is set up at the time of employment

How do you print expense report including attachments to pdf file like we used to be able to do in Concur?	If you search "Expense Reports," it should show you a report with a list of all expense reports, and that list is printable and exportable.
Can you delete the expense report?	If the expense report has been submitted, you will need to ask your approver to select "Deny" in their inbox which will delete the report. If they select "Send Back" the report will go back to you to make edits
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Do you still have to approve PCard charges in US Bank site?	US Bank has been replaced by Workday. Approvals take place within Workday.
I'm responsible to prepare all my provider expense reports. Where in Workday do I get access to that?	They will need to delegate this task to you within Workday. Here is a guide walking through these steps: https://d1vy0qa05cdjr5.cloudfront.net/8fb651dc-6f50-4f63-8ea3-82468310aae4/Public/Courses/2b09042c-8c31-401c-b376-5678f4fee448/WDES-102-Q2_Delegation_QRG-BD-QAFINAL.pdf
Is that changing since faculty cannot delegate to their AA to complete the expense reports?	Delegation is within the supervisory org within Workday. Any exceptions to this can be requested using a pegasus ticket for delegation exceptions.
So to confirm- we just need to complete our PCard expense reports within 30 days of the transaction, and not necessarily before the 1st of every month like previously with US Bank?	Yes, that is correct.