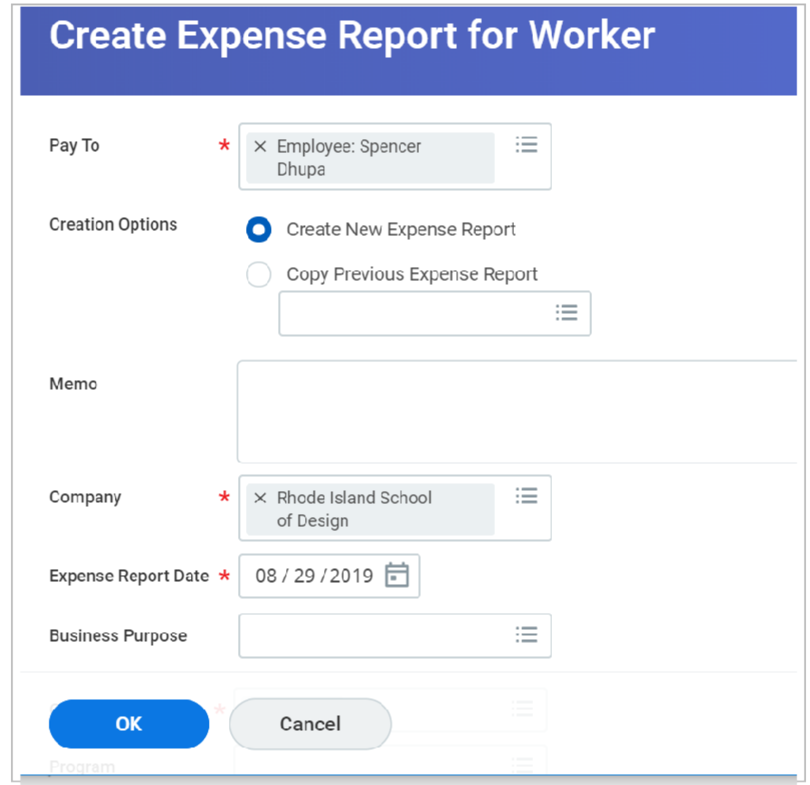
CREATE AN EXPENSE REPORT FOR WORKER

Create Expense Report for Worker allows one worker on behalf of another to submit expenses to be reimbursed for business-related costs, such as airfare, business meals or hotel expenses.

From the search bar:

1. Enter ***Create Expense Report for Worker***.
2. Select the **Create Expense Report for Worker**.
3. Enter the name of the worker at the **Expense Report For** field.
4. Select either **Create New Expense Report**, **Copy Previous Expense Report**, or **Create New Expense Report from Spend Authorization**. Your Selection determines what information displays on the new expense report.
5. Enter **Memo**. The information that you enter in the memo will appear as the title of the Expense report.
6. Select **Business Purpose** from the drop-down menu.
   Note: An error message stating Business Purpose Required will be displayed if you do not complete this step. To fix this error, you will need to navigate to the Header tab and edit your entry.
7. Click **OK** then **Add**.



ADD EXPENSE LINES

From the Expense Lines tab within an expense report:

8. Click the **Add** button under Expense Lines. Depending on the types of transactions available for processing, you may be asked to select **Credit Card Transactions** (transactions from worker's T&E card), **Quick Expense** (available images and/or entries from the worker's mobile app), or **New Expense**. (Note that you are able to link an existing Quick Expense entry from the worker's profile to a New Expense line.)

9. Complete all required fields, including Date, Expense Item, Quantity, Per Unit Amount, Total Amount, Financial Information (Cost Center, Function, Fund, etc.) and Business Topics as applicable.

   Note: See the Worktags section below if your organization requires a program, grant, gift, or project and/or RISD activity code to be associated with your expense report.

   Please see **Create Expense Report** job aid for details.

   Note: Enter applicable Worktags if your organization requires a project, cost center, and/or location to be associated with your expense report.

10. Add receipts and other documentation as attachments.
11. Click **Submit**.