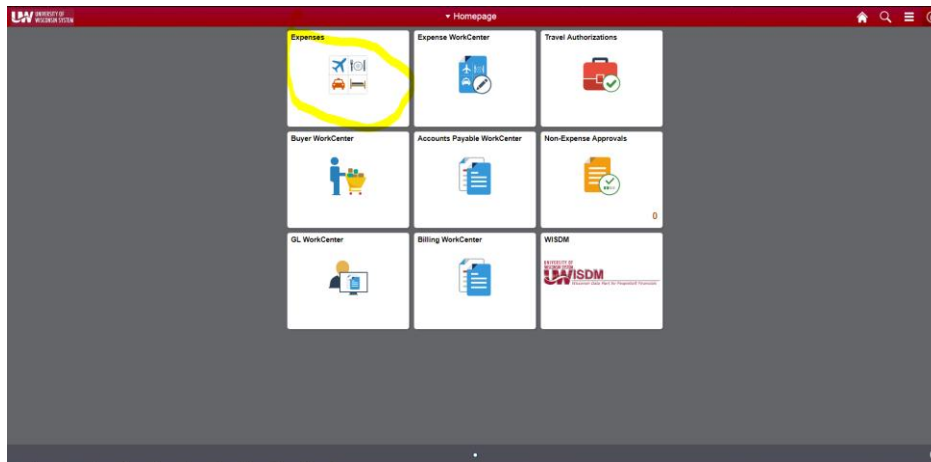


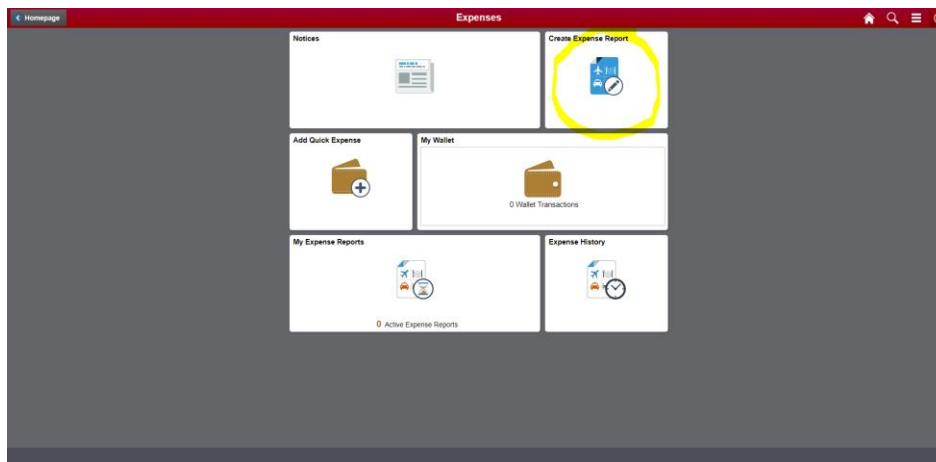
Claiming a Relocation Allowance/Stipend in e-Reimbursement

Last Updated: 3/08/19

1. Log in to [eReimbursement](#)
 - a. Log in credentials will be your UWSP username and password
2. Click on the 'Expenses' tile



3. Click on the 'Create Expense Report' tile



4. Enter General Information
 - a. Business Purpose: Relocation
 - b. Description: '(Your Last Name) Relocation MM/DD/YYYY'
 - c. Default Location: City you are moving to (most commonly Stevens Point, WI or Plover, WI)
 - d. Reference: Instate – All expenses are classified as instate, regardless of where you are moving from
 - e. Date of Departure: Date departing previous residence
 - f. Date of Return: Date arriving at new residence
5. Attachments – Attach authorization letter from HR, direct cost receipts, and/or Google Maps for any mileage claimed.

6. Accounting Defaults – Contact your hiring department ADA or supervisor to obtain the correct funding source. This information will be entered in the accounting defaults section.

Expense Report

Report: NEXT
ADAM SWANSON

General Information

*Business Purpose: Relocation
 *Description: Last Name Relocation
 *Default Location: STEVENS POINT, WI
 *Reference: INSTATE
 Date of departure: 02/01/2019
 Date of return: 02/03/2019

Attachments
 Accounting Defaults
 Justification (IS MISSING)

Creation Date: 02/14/2019 ADAM SWANSON
 Updated on: 02/14/2019

Expense Details

No expenses have been entered.

Custom Funding (JWS/TP/15329/102)
 Add Expense
 Quick-Fill

7. Justification

- a. Click on the line that says 'Justification (IS MISSING)'

Cancel Notes Done

There are no notes for this expense report.

Add Notes

- b. Click on 'Add Notes'
- c. Enter your justification in the text box. This box is used to provide any information regarding your expense report to the auditor that could help avoid send backs. Always start with 'Relocation Expenses for (Your Name)'. List expenses you'll be claiming, such as direct costs, mileage, or relocation stipend.

Cancel Notes Done

Relocation Stipend for New Employee

- d. When you've completed your note, click 'Done'.
 - i. Note: Make sure your note is accurate before clicking done. You are unable to edit existing notes. Instead, you must delete the existing note and add a new note. You can add as many notes as is needed, so if you've forgotten to list anything feel free to add a second note when you remember.

Cancel Notes Done

1 row

Date/Time	Name	Role	Notes
02/14/2019 1:40 PM	ADAM SWANSON	Employee	Relocation Stipend for New Employee

8. Click on 'Add Expense' (green button)
9. Click on the magnifying glass after the 'Expense Type' field

The screenshot shows the 'New Expense' form for the date 02/01/2019. The form is titled 'New Expense - 02/01/2019'. It includes a sidebar on the left with a 'New Expense' button and a table showing a total of 0.00 USD. The main form area has fields for 'Date' (02/01/2019), 'Expense Type' (with a magnifying glass icon), 'Description', 'Payment' (dropdown), 'Amount' (0.00 USD), and 'Additional Information' (Accounting). At the top right, there are 'Save' and 'Review and Submit' buttons. The user's name 'ADAM SWANSON' is visible at the top left.

10. Click on the 'All Types' tab and select your expense type.
 - a. There are 4 expense types that you'll potentially use depending on your situation: Relocation-Direct Moving Costs, Relocation-Stipend, Relocation-Temporary Lodging, and Mileage. Each of these expense types are outlined below. Each expense type will require different information specific to that expense.

The screenshot shows the 'Expense Type Search' dialog box. It has a 'Cancel' button and two tabs: 'Frequently Used' and 'All Types'. The 'All Types' tab is selected. Below the tabs is a search bar labeled 'Search Expense Type' with a magnifying glass icon. Below the search bar is a list of expense types: 'Parking', 'Registration Fee', 'Relocation-Direct Moving Costs', 'Relocation-Stipend' (highlighted in yellow), 'Relocation-Temporary Lodging', 'Taxi/Subway/City Bus, etc.', and 'Train/Bus/Other Long Distance'. The dialog box indicates there are 29 rows in the list.

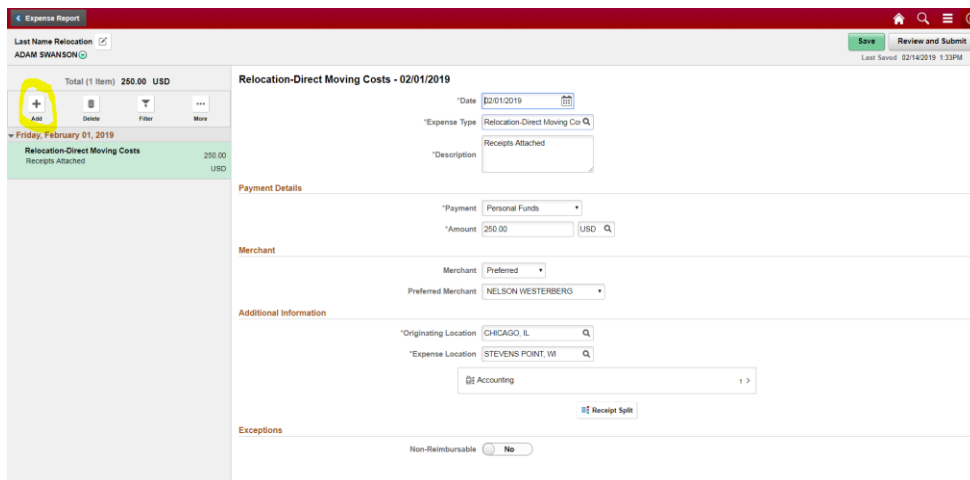
11. Relocation-Direct Moving Costs

- a. Attach receipts totaling the amount claimed. See the [Employee Relocation Policy](#) to determine eligible expenses under this classification.
- b. Payment: Personal Funds
- c. Amount: Total of receipts from allowable expenses.
- d. Merchant: Select Preferred if the merchant is Nelson Westerberg or Piepho Moving & Storage and select the merchant name from the drop-down. For all other merchants, select Non-Preferred and enter the name of the merchant in the Non-Preferred Merchant field.
- e. Originating Location: City of previous residence
- f. Expense Location: City of new residence

Relocation-Direct Moving Costs - 02/01/2019

*Date	02/01/2019	
*Expense Type	Relocation-Direct Moving Co:	
*Description	<div></div>	
Payment Details		
*Payment	Personal Funds	
*Amount	0.00	USD
Merchant		
Merchant	Non-Preferred	
Non-Preferred Merchant	<div></div>	
Additional Information		
*Originating Location	<div></div>	
*Expense Location	STEVENS POINT, WI	
	<div> Accounting </div>	
	<div> Receipt Split</div>	
Exceptions		
Non-Reimbursable	<input type="radio"/> No	

- g. Click 'Add' (on the left side of the screen) to add another expense or, if this is your last expense, click 'Review and Submit' (upper right corner).



Expense Report

Last Name Relocation: ADAM SWANSON

Relocation-Direct Moving Costs - 02/01/2019

*Date: 02/01/2019

*Expense Type: Relocation-Direct Moving Cos

*Description: Receipts Attached

Payment Details

*Payment: Personal Funds

*Amount: 250.00 USD

Merchant

Merchant: Preferred

Preferred Merchant: NELSON WESTERBERG

Additional Information

*Originating Location: CHICAGO, IL

*Expense Location: STEVENS POINT, WI

Accounting: 1 >

Exceptions

Non-Reimbursable: No

12. Relocation Stipend

- Payment: Personal Funds
- Amount: Determined by Authorization Letter
- Originating Location: City of previous residence
- Expense Location: City of new residence

Relocation-Stipend - 02/01/2019

*Date: 02/01/2019

*Expense Type: Relocation-Stipend

*Description:

Payment Details

*Payment: Personal Funds

*Amount: 0.00 USD

Additional Information

*Originating Location:

*Expense Location: STEVENS POINT, WI

Accounting: 1 >

Exceptions

Non-Reimbursable: No

13. Relocation-Temporary Lodging

- Temporary lodging may be allowable depending on the circumstances of your relocation. Receipts for lodging expenses must be submitted. See the [Employee Relocation Policy](#) for more information.
- Number of Nights: Number of nights claimed for your temporary lodging
- Payment: Personal Funds
- Amount: Amount receipted by the lodging provider
- Merchant: Select Preferred if the merchant is available in the drop-down (most hotel chains are available for selection). For all other merchants, select Non-Preferred and enter the name of the merchant in the Non-Preferred Merchant field.
- Originating Location: City of previous residence

g. Expense Location: City of new residence

Relocation-Temporary Lodging - 02/01/2019

*Date	02/01/2019	
*Expense Type	Relocation-Temporary Lodgin	
*Description	<div></div>	
*Number of Nights	<div></div>	

Payment Details

*Payment	Personal Funds	
*Amount	0.00	USD

Merchant

Merchant	Non-Preferred	
Non-Preferred Merchant	<div></div>	

Additional Information

*Originating Location	<div></div>	
*Expense Location	STEVENS POINT, WI	
<div> Accounting 1 ></div>		

Receipt Split

Exceptions

Non-Reimbursable ☐ No

14. Mileage

- In some cases, you may be eligible to claim one-way mileage from your previous residence to your new residence. A Google Maps printout is required for reimbursement (example provided below). See the [Employee Relocation Policy](#) for more information.
- Transportation ID: Standard Rate
- Miles: Match Google Map for route taken
- Payment: Personal Funds
- Originating Location: City of previous residence
- Destination Location: City of new residence

Mileage - 02/01/2019

*Date	02/01/2019
*Expense Type	Mileage
Description	One-Way from previous residence

Mileage

*Transportation ID	STANDARD RATE
Transportation Type	STDR
*Miles	263 x 0.5800

Payment Details

*Payment	Personal Funds
*Amount	152.54 USD

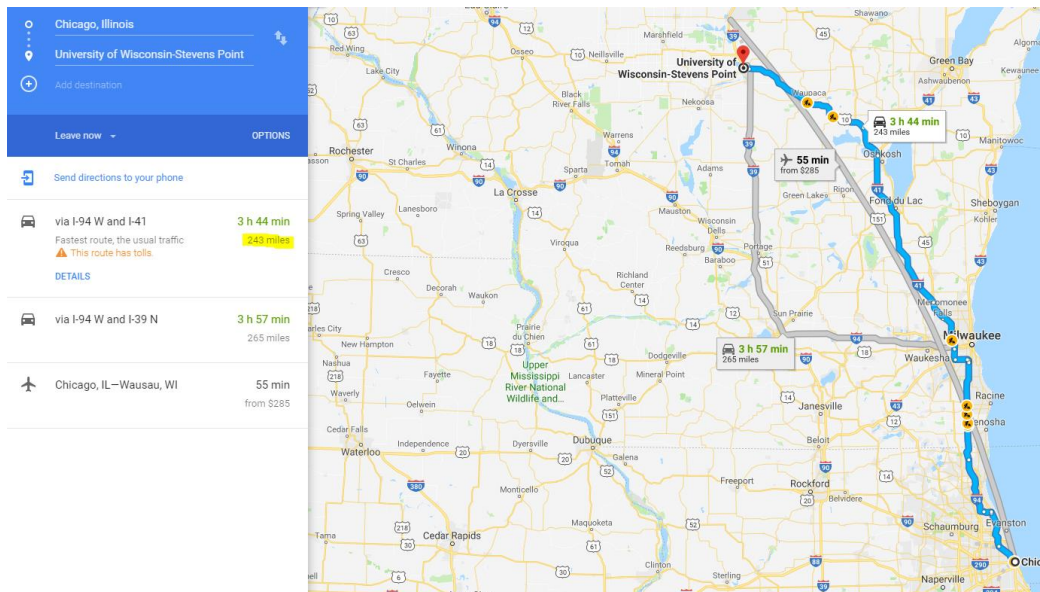
Additional Information

*Originating Location	CHICAGO, IL
*Destination Location	STEVENS POINT, WI
Accounting	1 >

Exceptions

Non-Reimbursable ☒ No

Google Maps example:



15. After entering all expenses, click the 'Review and Submit' button in the upper right corner

Expense Report

Last Name Relocation
ADAM SWANSON

Total (3 Items) 1,200.00 USD

Mileage - 02/01/2019

*Date 02/01/2019
*Expense Type Mileage
Description One-Way from previous residence

*Transportation ID STANDARD RATE
Transportation Type STDRIT
*Miles 263 x 0.5800

*Payment Personal Funds
*Amount 152.54 USD

*Originating Location CHICAGO, IL
*Destination Location STEVENS POINT, WI
Accounting 1.3

Non-Reimbursable ☐ No

16. On the review and submit page, the eReimbursement software will verify that all errors are corrected and you're ready to submit. If the submit button is greyed out (example below), you'll need to correct any errors before submitting.

Update Details **Submit**

Last Saved 02/18/2019 11:04AM

17. Any errors will be listed next to a red flag at the top of the page (example below)

Expense Entry

Last Name Relocation
ADAM SWANSON

Please enter justification

Expense Report Summary

Total (3 Items)	1,234.56 USD
Due to Employee	1,234.56 USD

Additional Information

View Details

18. Verify that the 'Due to Employee' amount is what you anticipate receiving
19. Click the green 'Submit' button. After agreeing to some statements that you are making correct reimbursement claims, you will have submitted your first expense report! Any send-back or approval messages will be emailed to your campus email account.

Expense Entry

Expense Summary

Home

Search

Menu

Help

Last Name Relocation

ADAM SWANSON

Update Details

Submit

Last Saved: 02/18/2019 11:25AM

Expense Report Summary

Total (3 Items)	1,234.56 USD
Due to Employee	1,234.56 USD

Approval Status

Report ID: 000060615	Pending
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Additional Information

View Analytics

Justification and Supporting Details 1

View Printable Report