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.

7. Justification
   a. Click on the line that says ‘Justification (IS MISSING)’
   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.
   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.
8. Click on ‘Add Expense’ (green button)
9. Click on the magnifying glass after the ‘Expense Type’ field

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.
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

   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).
12. Relocation Stipend
   a. Payment: Personal Funds
   b. Amount: Determined by Authorization Letter
   c. Originating Location: City of previous residence
   d. Expense Location: City of new residence

13. Relocation-Temporary Lodging
   a. 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.
   b. Number of Nights: Number of nights claimed for your temporary lodging
   c. Payment: Personal Funds
   d. Amount: Amount receipted by the lodging provider
   e. 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.
   f. Originating Location: City of previous residence
g. Expense Location: City of new residence

14. Mileage
   a. 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.
   b. Transportation ID: Standard Rate
   c. Miles: Match Google Map for route taken
   d. Payment: Personal Funds
   e. Originating Location: City of previous residence
   f. Destination Location: City of new residence
Mileage - 02/01/2019

**Date**: 02/01/2019

**Expense Type**: Mileage

**Description**: One-Way from previous residence

**Transportation ID**: STANDARD RATE

**Transportation Type**: STDRT

**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

**Exceptions**

Non-Reimbursable: No

Google Maps example:

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

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

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.
<table>
<thead>
<tr>
<th>Expense Report Summary</th>
<th>Expense Report Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverages</td>
<td>$1,204.91 USD</td>
</tr>
<tr>
<td>Laundry</td>
<td>$720.40 USD</td>
</tr>
</tbody>
</table>

**Additional Information**
- View Receipt
- View Details
- View Portable Report