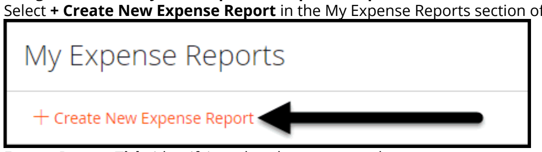
Article ID: PCTY-64257
Create and Submit Expense Report

To Create a New Expense Report:

1. Navigate to **HR & Payroll > Expense > Expense Reports**
2. Select **+ Create New Expense Report** in the My Expense Reports section of the My Expense Report Page



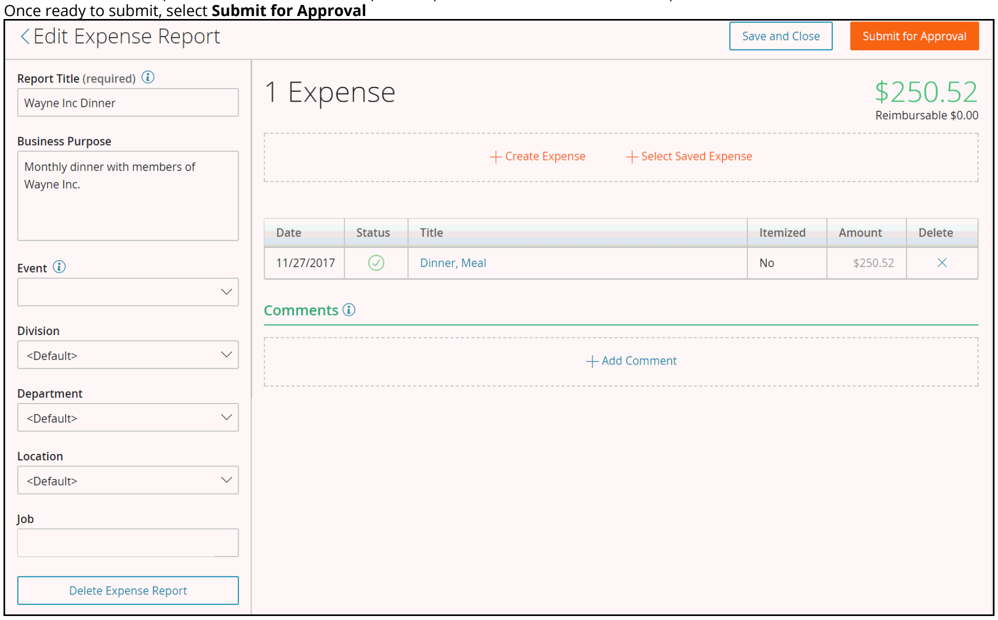
3. Enter a **Report Title** identifying what the expense relates to
4. If applicable, enter **Business Purpose**
5. **Select** an event from the dropdown menu to align report with specific event
6. Configure any applicable costs using the dropdown menu if the expense report is associated with cost centers different than the default

Important Information:

- If any of the required fields are not populated, expenses will not be able to be added using the + create expense button
- If **+ Create New Expense Report** cannot be selected, the expense policy assigned does not allow Expense Reports to be submitted

To Add Expenses to the Report and Submit:

1. Select **+ Create Expense**
2. Enter a *title* for the expense
3. Enter the *date of the expense* manually or by selecting a date on the calendar
4. Select **payment method** from the dropdown menu to indicate how the expense was paid
5. Using the **Category** dropdown menu, select the best category associated with the expense
6. For non-milage categories, enter the **dollar amount**
7. If mileage is selected, enter the **number of miles** or select **Yes** in the **Calculate Mileage?** box to enter the beginning and ending addresses
8. Select **Calculate** to populate the **Number of Miles** field
9. Input information in **Notes** field
10. If applicable, select **Yes** in the Override Cost Center box to change the cost center(s) aligned with the expense
    - Depending on the policy assigned to, this may or may not be configurable
11. If applicable, select **Yes** in the Itemize? box to create additional line items associated with the expense
12. Add a receipt to the expense for verification purposes
    - Depending on the policy assigned to and the dollar amount entered, a receipt may or may not be required
13. **Drag and drop** a JPEG, PNG, or PDF file from your device to the Receipts section
14. Select **Upload from Computer**
15. Select **Select from Gallery** to choose a receipt previously uploaded to the Receipt Gallery
16. Select **Save** to create the expense
17. Add any additional expenses as necessary
18. If no more expenses are applicable, review the Status column to verify if the expense report passed validation
    - A checkmark confirms validation and the expense report can be submitted
    - A warning icon indicates that a receipt was not attached for an expense requiring a receipt, but can be submitted since information was entered in the Notes
    - An exclamation point will not allow for the expense report to be submitted until a receipt or note is attached.
19. Once ready to submit, select **Submit for Approval**



Important Information:

- Receipts can be added at any point once landing on the Create New Expense page
- Select **+ Select Saved Expense** to apply previously created expenses to the report
- Select **Save and Close** to save the report on the My Expense Reports page in a status of Unsubmitted
- Automated notifications will be generated when the report is submitted, if the report is returned, when the report is approved, and paid via Web Pay payroll processing
- Depending on the Web Pay user account configuration by a company administrator, these notifications can be received via personal and/or work email, or exclusively through the Web Pay Notifications > Message Center page.
- The **Calculate Mileage** option is only available if the category is set to **Type = Mileage**.

Please see the video below: