Typical Expense Report Steps ‘Summary’

- Quick-start button from request
- Update header if needed (report name: Dept-last name- city- conference- first date of travel)
- Itinerary (to calculate fixed meals, do not use import feature, WL-business destination, Business destination- WL)
- Meals provided?
- Import Charges
- Add other expenses, marking as ‘cash’ if paid personally
- Verify all expense types correct
- Mark meals purchased on Visa Travel card, personal
- Itemize where needed (lodging)
- Make comments (taxi, shuttles, etc- to/from business locations)
- Attach required receipts (lodging always, all others if over $75)
- Allocate charges
- Review & Submit

*please note that these are basic steps to completing an expense report, they may not include all steps required to complete every travel expense report scenario but are a good reminder.