1. On Workday’s home page, under Applications click Expenses.

2. In the Actions section, click Create Expense Report.

3. Choose one of the Creation Options.

4. In Memo section enter a description about the expense.
   **TIP:** Be specific as this becomes part of the expense report name.

5. Review and update, if required, the Cost Center.
   **TIP:** If you change the Cost Centre the additional Worktags automatically update.
HOW DO I Get Reimbursed for an Expense?

ABOUT THIS TASK: Describes how to get reimbursed for an “out of pocket” expense.

AUDIENCE: All UBC Staff and Faculty

DETAILED JOB AID: Expense Reporting: Create Expense Report – Out of Pocket

Note: All values in screenshots are examples only and may not refer to actual data in Workday.

6. Click Add and select New Expense.

7. Complete the date (this is the transaction date), expense item (type key words and related results will display), total amount fields and update currency field, if applicable.
   TIP: More information on Goods and Services, Air Travel, Per Diem, Meals and Attendees can be found in the detailed Expense Reporting: Create Expense Report – Out of Pocket.

8. Complete Item Details.
   TIP: The Item Details fields change based on the Expense Item. If applicable, use the Attendee(s) field to document any non-UBC guests.
   TIP: Ensure destination is entered as this calculates the tax.

9. Attach screenshot(s) of receipts.
   TIP: Use Quick Expenses on the Workday Mobile app for an easy way to upload receipts.

10. Click Submit or Save for Later.