

HEP Instructions/Process for Submitting Expense Reimbursements

This process is for all employees including PIs, scientists, postdocs, graduate students and staff.

Before submitting your first expense report you must setup your payment elections and your delegations. You will only need to set them up once.

Please follow these steps to submit an expense report:

1. Complete the Physics and Astronomy Employee Business Expense Reimbursement form. *
2. Create a single pdf file with all receipts in the order they are listed on the reimbursement form.
3. Add your signature to the form (please leave the form in excel)
4. Send the excel form and single file of pdf receipts to Connie Jones. If Connie is not available send them to Laura Scuderi. If you are in Frank Wolfs' group send them to Laura.
5. Connie (or Laura) will review the form and receipts and let you know if any changes are suggested.
6. Connie (or Laura) will combine the form and receipts into one pdf document and send it to your supervisor for approval.
7. Connie (or Laura) will enter the reimbursement details into the workday expense system on your behalf and will approve the reimbursement on your behalf.

* Please use the notes box to include information such as:

- Expenses that were paid for by someone else
- Expenses that are charged to the Fermilab or CERN accounts
- Justification for airfare upgrades or use of a non-US carrier
- Details of any personal time during travel
- Any other information that would be helpful to approvers

You are able to check the status of an expense report submitted for you. To do this in workday, type My Expense Reports in the search bar.

Please see the department website for forms and more information

(add link when live)