Expense Report Request
eForm
Department User’s Guide
The Expense Report Request eForm is designed to take the place of the Excel Business Expense Reimbursement form for Finance Center creation of iExpense Expense Reports.
Expense Report Request eForm

Features drop-down field selection for:

• Employee name
• Approver/Grant Manager Reviewer
• Meal Actual/Per Diem
• Chart type selection with Nicknames from the iExpense “My Allocations”, including PTAEO’s
Expense Report Request eForm

Features

• Drop-down attachment Document Type
• Drag-and-drop attachment functionality in browser
Expense Report Request eForm

Required Fields:

- Payee Name – Employees Only
- iExpense Approver – GL Expense Reports
- iExpense Grant Manager Review – PTAEIO funded Expense Reports
- Business Purpose – Why, Where, When
- Start Date
- Chart Type and String
- Amount or Distribution %
Expense Report Request eForm

Options to provide Expense Itemization:

• Upload an Expense Itemization Document

-or-

• Use Comments to provide itemization of expenses

Comments
Please provide an itemization for each expense where a receipt is not attached.

Out of Pocket: Meal: 6/19: $9.50
Expense Report Request eForm

- Save for Completion later
- Email will be sent to access form later

- Submit to Finance Center for iExpense Report Creation
- Email will be sent to access status of eForm

- Will discard the eForm