CREATE AN EXPENSE REPORT WITH PERSONAL TRAVEL DAYS

TRAVEL APPLICATION

Expense

HELPFUL HINTS

ℹ️ If personal travel days are adjacent or in the middle of business travel days, the personal days should be excluded from the expense report reimbursement.

PROCEDURE – PERSONAL DATE(S) AT BEGINNING OR END OF TRIP

Create the expense report by clicking **Expense** from the approved travel request. On the report header, the travel dates and personal dates of travel will auto-fill from the travel request.

For this example, business travel dates were *April 15-18* and personal travel dates were *April 19-20*.

Change the business end date to reflect the actual business days, which for this example was April 18, 2021.

Click [Next >>] to continue. On the itinerary, enter the dates of the business travel. Click [Next >>] on this and the next screen.

Select any meals that were provided to the traveler by checking the corresponding box. Click [Create Expenses].

Travel Allowances For Report: Roswell, NM

1 Create New Itinerary   2 Available Itineraries   3 Expenses & Adjustments

Show dates from [   ] to [   ] Go

Exclude | All ☐		Date/Location ▲	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
☐		04/15/2021 Roswell, New Mexico	☐	☐	☐	$28.88
☐		04/16/2021 Roswell, New Mexico	☐	☐	☐	$38.50
☐		04/17/2021 Roswell, New Mexico	☐	☐	☐	$38.50
☐		04/18/2021 Roswell, New Mexico	☐	☐	☐	$28.88

<< Previous   Create Expenses   Cancel

Continue filling out the expense report.

PROCEDURE – PERSONAL DATE(S) IN MIDDLE OF TRIP

If personal travel was in the middle of business travel, no changes are required on the report header. However, the travel itinerary will need to be adjusted.

On the travel itinerary with per diem for meals, click **Exclude** for the days that were personal travel.

Continue filling out the expense report.