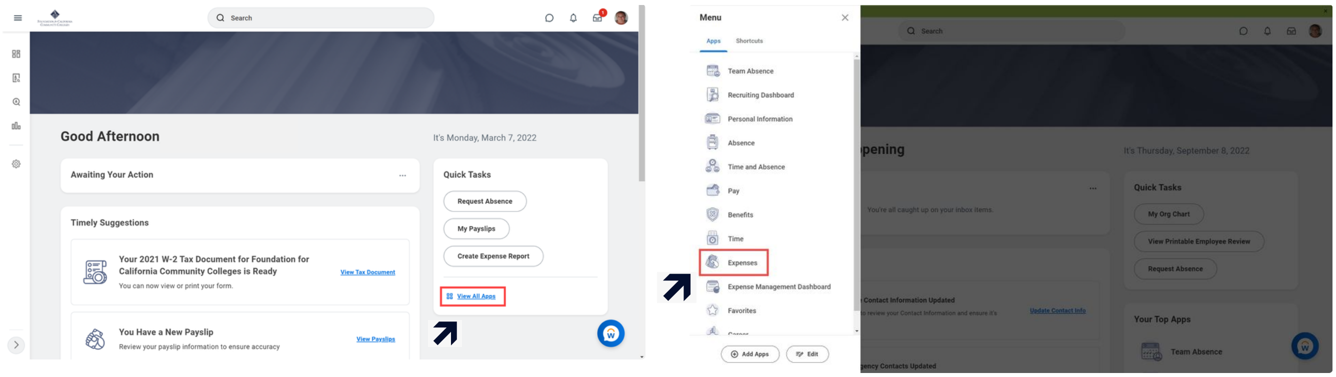
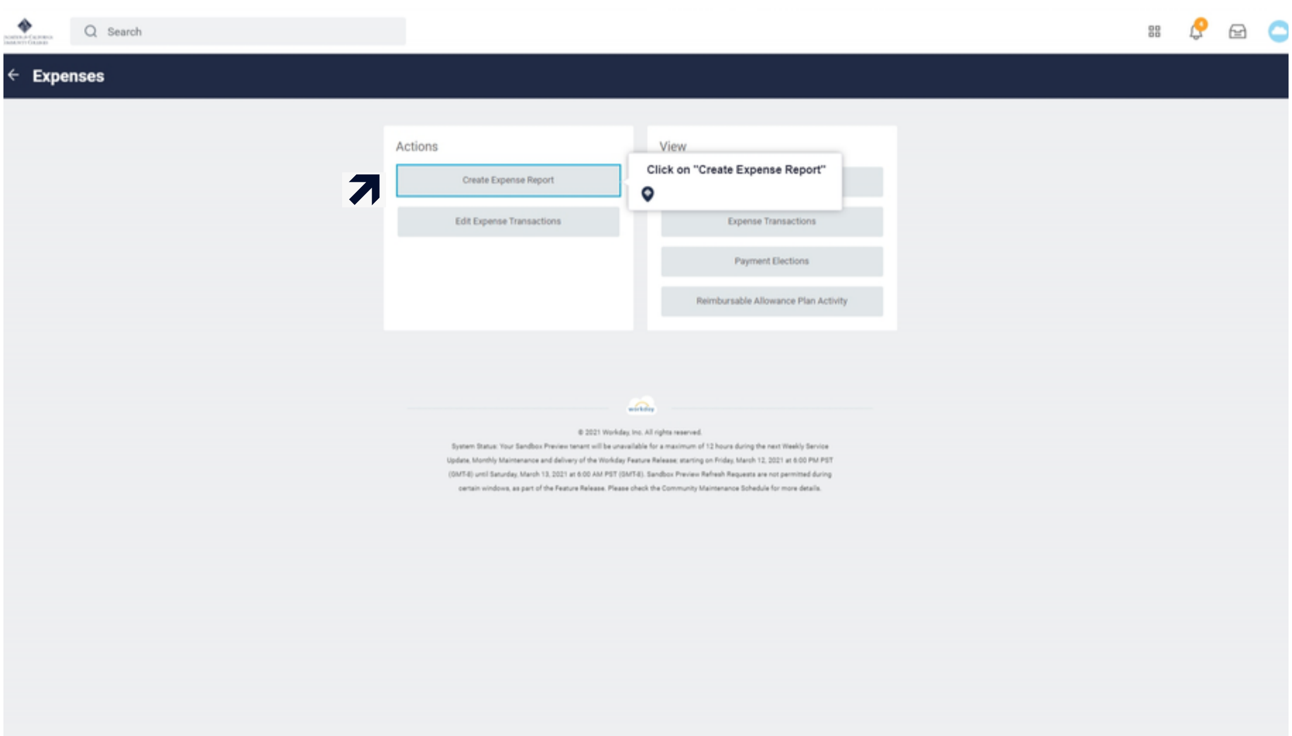
Workday | Create an Expense Report

NOTE: Workday will not allow you to submit an Expense Payment until you have set up your direct deposit in Workday.

1. From the landing page, click “View All Apps” > and select “Expenses.”



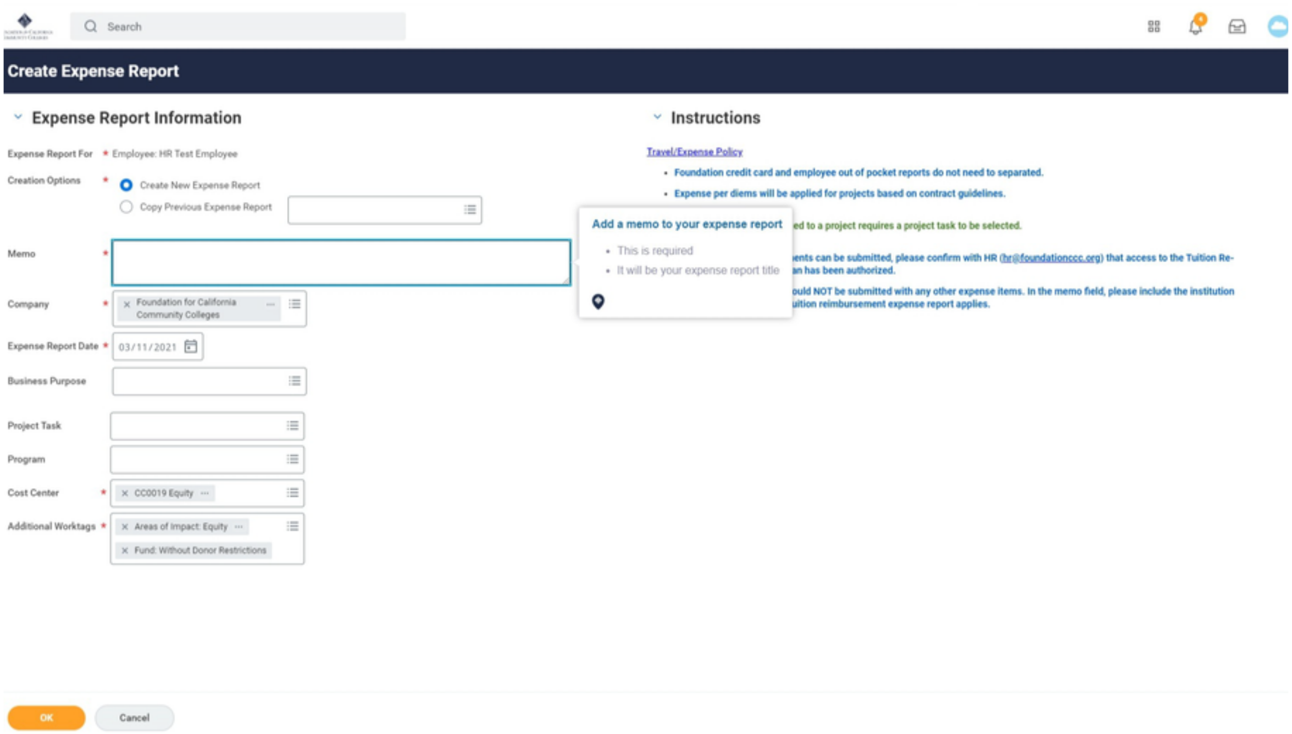
2. Click on "Create Expense Report."



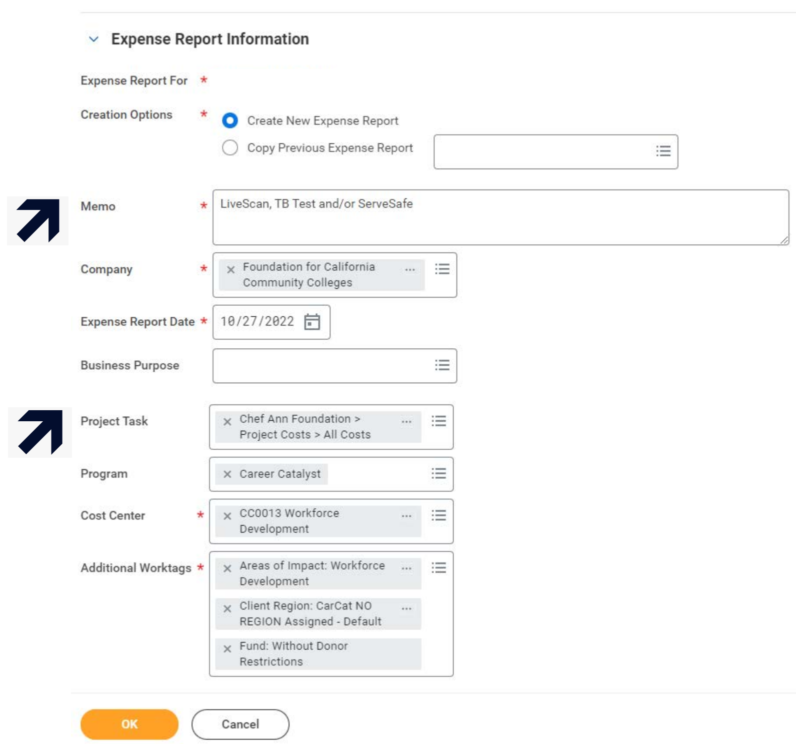
3. Select "create a new expense report".

- Note: You can create an expense Report for all pre-hire expenses (LiveScan, TB Test and/or ServeSafe) at once or individually

4. Add a memo to your expense report. Here is where you will enter the type of expense you are submitting within this request (LiveScan, TB Test and/or ServeSafe)

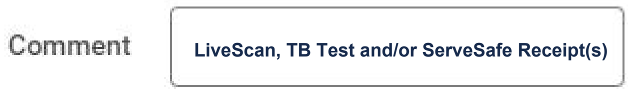


5. A Project Task is required to be entered. You will always select the cell next to project task > Select "My Worktags" > Select "Chef Ann Foundation > Project Costs > All Costs". Select "ok".



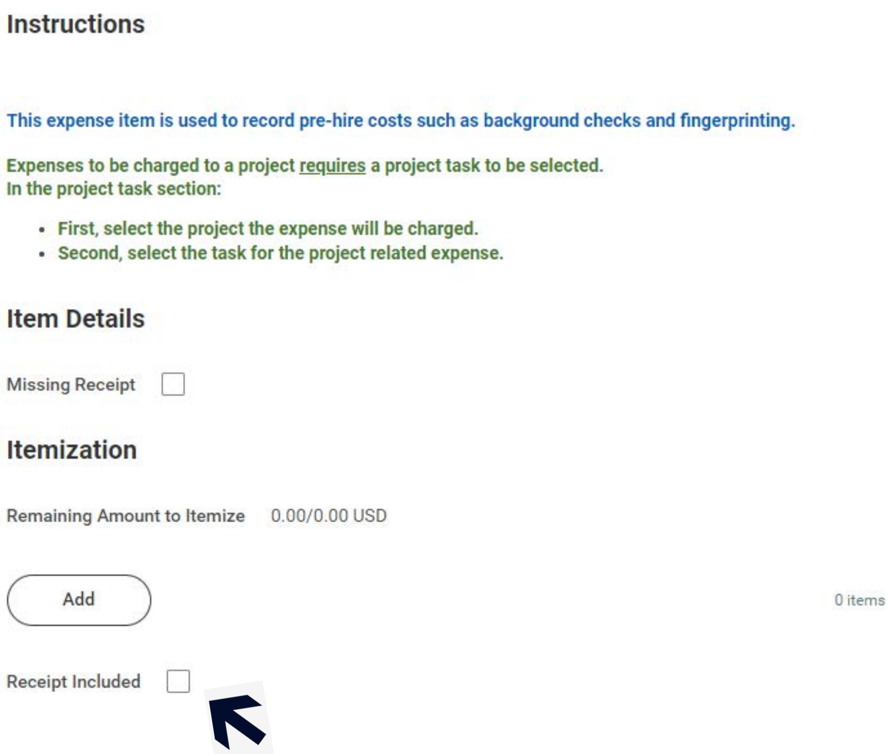
6. Click "Add" to add a new expense line and a new expense line will be added.

7. Drop or Attach a copy or photo of your receipt(s). Once you upload them you will be required to enter a comment. Please enter the comment as: "LiveScan, TB Test and/or ServeSafe Receipt(s)" . **Receipts are required for all expense payments.**

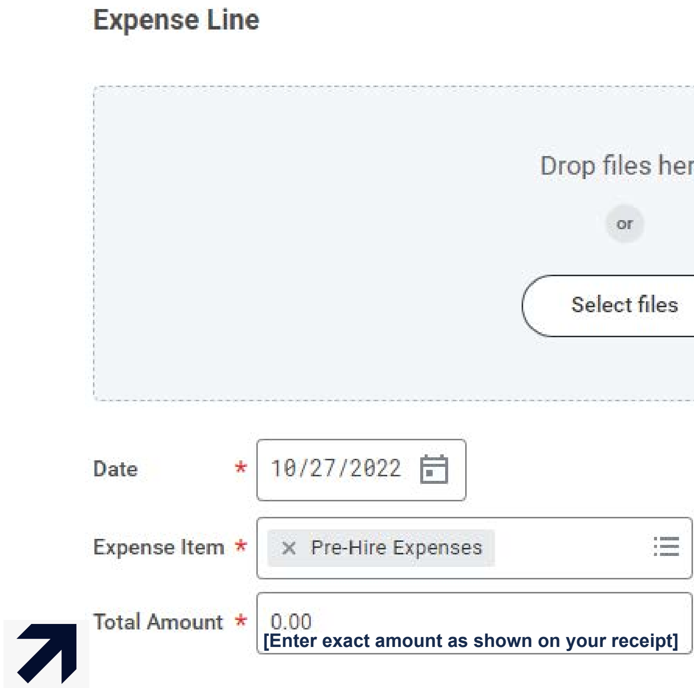


8. Enter a date for the expense transaction.

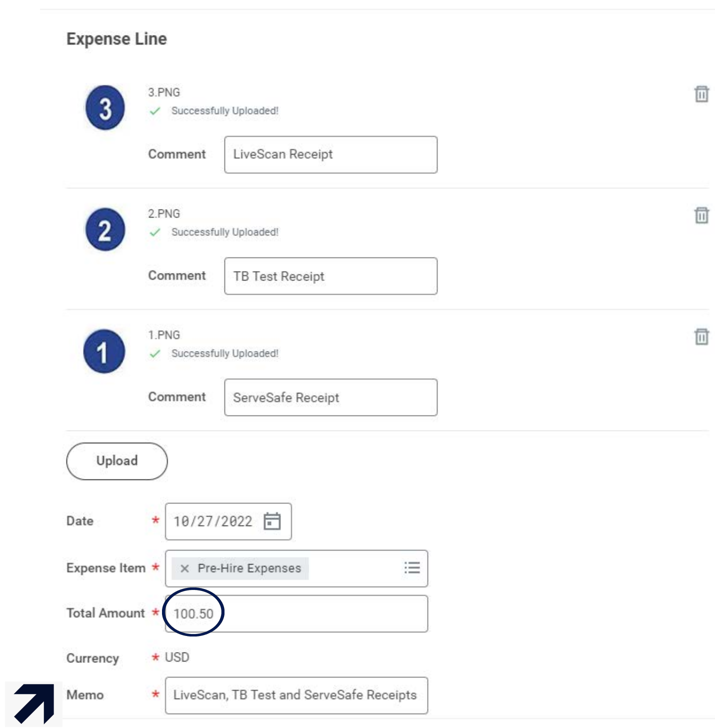
9. Select an expense item. Type in "Pre-hire Expenses" and additional details will appear on the right side of the screen. Select "Receipt Included"



10. Enter the total reimbursable amount of the expense item(s). Please ensure that this total matches exactly the receipts you are submitting. If you are submitting multiple in one expense request please total all receipts up and enter the total amount (do not round up).



11. Enter an expense item description in the memo field. "LiveScan, TB Test and/or ServeSafe Receipt(s)". Hit "Submit".



12. Your Expenses will route to your Timekeeper Supervisor for approval. Your Supervisor will review to ensure that everything was submitted correctly and that the receipts match the total amount that is being reimbursed. If it does not, it will be sent back to your Workday inbox to correct.

- Once approved, and off-cycle payment will be completed based on how you set up your preferred method for "Expense Payments" under "Payment Elections" in your Workday profile.