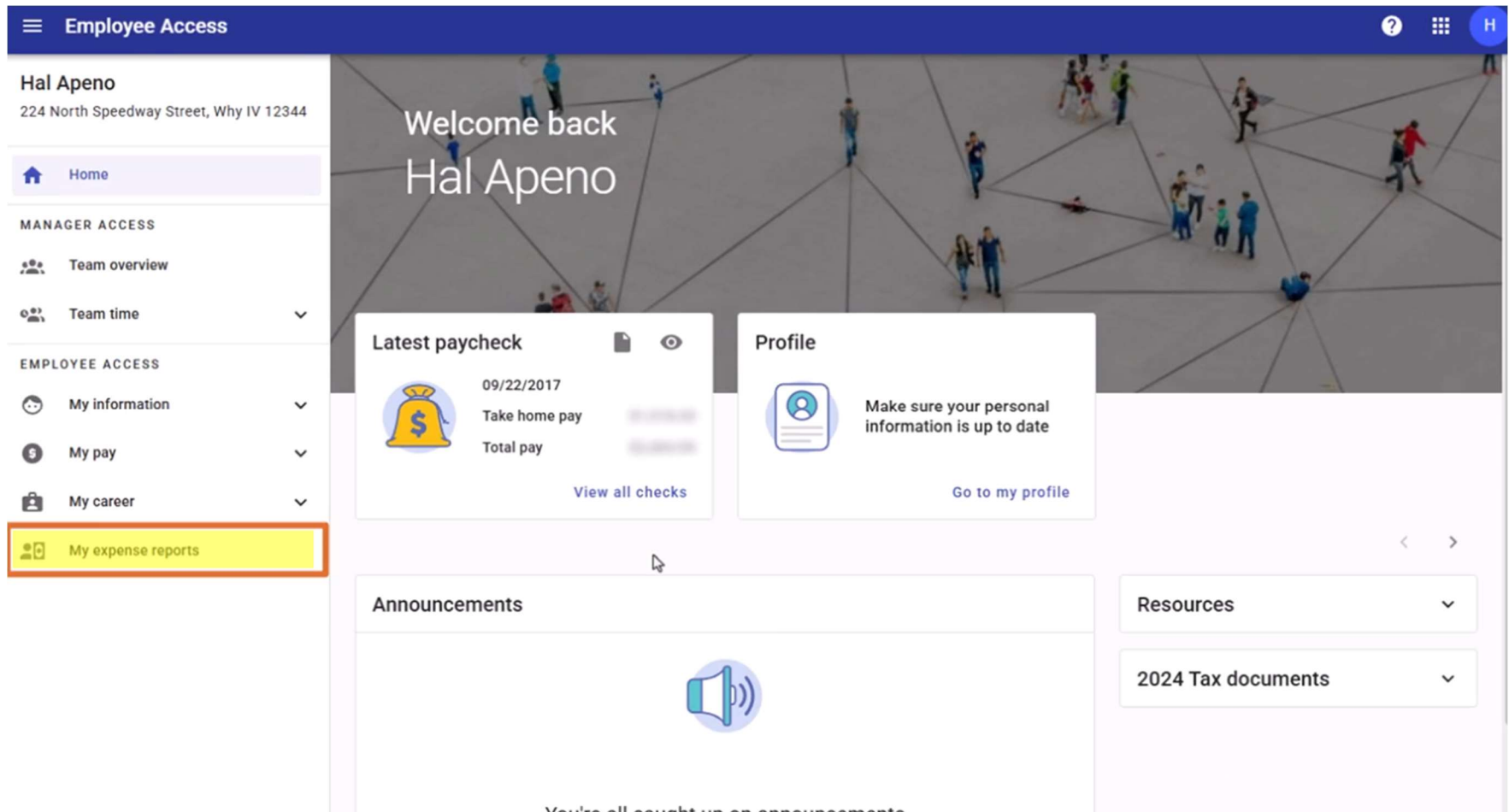


Expense Reimbursement Process – NEW METHOD done via employee access as of January 2026

From the Employee Access homepage, you'll notice a My Expense Reports option available from the menu.

- Select **My Expense Reports** to open the My Expense Reports page.
 - You'll notice the word Claim displays throughout the system. For example, the My Claims header, Claim Numbers under this header, and the Add Claim button. So, when you encounter the word claim, it's synonymous with expense reimbursement requests.



Existing expense requests or claims display under the **My Claims header** and include the status, claim number, date, employee, and amount.

The statuses are color coded for easier identification.

Use the icons to edit, copy, or delete a claim.

Not all icons display for all claims.

For example, claims with the status of in progress, Paid, or Void won't have an edit or delete option.

Employee Access

Hal Apeno
224 North Speedway Street, Why IV 12344

My expense reports [Add claim](#)

What do you want to do? [Filter](#)

My claims

Next Approver	Status	Claim number	Date	Employee	Amount	Actions
AP	In progress	185	03/31/2025	Abbott, Peter Jaybird	\$108.00	
Orig	Open	183	03/06/2025	Abbott, Peter Jaybird	\$0.00	Edit, Copy, Delete
Orig	Open	182	03/05/2025	Abbott, Peter Jaybird		

Select a claim to review.

Click to select this **expense claim arrow** to view additional claim details, per unit expenses, and attachments associated with the claim like receipts.

Employee Access

Hal Apeno
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Home

MANAGER ACCESS

Team overview

Team time

EMPLOYEE ACCESS

My information

My pay

My career

My expense reports

My expense reports

Add claim

What do you want to do?
Search by claim number, next approver or employee

Filter

My claims

Next Approver: AP
Claim number: 185
03/31/2025
Employee: Abbott, Peter Jaybird
In progress
\$108.00

Next Approver: Orig
Claim number: 183
03/06/2025
Employee: Abbott, Peter Jaybird
Open
\$0.00

Next Approver: Orig
Claim number: 182
03/05/2025
Employee: Abbott, Peter Jaybird
Open
\$0.00

Claim 185 details

Next Approver: AP
In progress
\$108.00

Claim Details

Claim type	Expense Date	Employee
Expense Reimbursement	03/31/2025	Abbott, Peter Jaybird
Activity Description	Notes	PCard
Travel	Travel Expense...	No
PCard Vendor	Pre-Approval	Department
n/a	No	Business and Finance Services

Per unit expenses \$108.00

Attachments

Use the **"What do you want to do?"** search field to help locate claims.

- Search for specific claim numbers, approvers, employees, and more.

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My expense reports

Add claim

What do you want to do?

Search by claim number, next approver or employee

182

Filter

My claims

Next Approver: Orig


Open

Claim number 182

03/05/2025

Employee: Abbott, Peter Jaybird

\$0.00



Select a claim to review.

- In addition, use the **filter** button to display a series of filters for even further flexibility with locating claims.
- Filter claims by status, pre-approval, or date.

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Home

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My expense reports

Add claim

What do you want to do?

Search by claim number, next approver or employee

Filter

Filters

0 filters applied

Reset all

Status

Clear

Pre-Approval

Clear

Date

Clear

My claims

Next Approver: AP

In progress

Claim number: 185

03/31/2025

Employee: Abbott, Peter Jaybird

\$108.00

Next Approver: Orig

Open

Claim number: 183

03/06/2025

Employee: Abbott, Peter Jaybird

\$0.00

Next Approver: Orig

Open

Claim number: 182

03/05/2025

Employee: Abbott

Select a claim to review.

Click **add claim** to display the add claim window.

Click the **claim template drop down**, select expense reimbursement, and then click next.

The screenshot displays the 'Employee Access' dashboard. On the left, a sidebar lists navigation options: Home, Team overview, Team time, My information, My pay, My career, and My expense reports. The main content area is titled 'My expense reports' and includes a search bar and a list of claims. A modal dialog box titled 'Add claim' is open in the center, prompting the user to 'Let's start with defining your claim type.' It features a 'Claim Template' dropdown menu, which is circled in orange. The dialog also has 'Cancel' and 'Next' buttons. In the top right corner of the dashboard, an 'Add claim' button is highlighted with a yellow circle. The background shows a list of claims with details like 'Claim number', 'Employee', and 'Amount'.

The **claim steps display** at the top so you easily know where you are and what's left to do. You start with claim details, then per unit, attachments, and then review.

Complete all claim details as appropriate.

Required fields have a red asterisk.

If you process claims for others, you'll see their names as options in the employee drop down. Otherwise, only your name displays as an option.

With the claim details entered, click next to advance to the per unit step.

Employee Access

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Home

MANAGER ACCESS

- Team overview
- Team time

EMPLOYEE ACCESS

- My information
- My pay
- My career
- My expense reports**

← New expense claim

1 Claim details 2 Per unit 3 Attachments 4 Review

Claim Details

* Expense date
03/31/2025

* Employee
Abbott, Peter Jaybird

* Department
Business and Finance Services

* Activity Description
Travel

Notes
Travel Expense...

☐ Pre-Approval

☐ PCard

PCard Vendor

Save for later Next

This is where you add the type of expense.

Click add unit expense and then complete the expense details.

Click Add Unit Expense to add additional expenses to this record, like a meal expense, for example.

With the per unit information entered, click Next to advance to the Attachments step.

[←](#) **New expense claim**

✓ Claim details

Per unit

3 Attachments

4 Review

Per Unit

* Unit Type

2026 CONF MILE

i

Unit count

56

\$ Cost per unit

0.72

Expense Total

= \$40.60

Description

2026 CONF MILE

* Account

10.00.2520.0104.0.333 - FISCAL SERVICES MILEAGE

Grant Project

Total unit expenses \$40.60

+ Add unit expense

Save for later

Previous

Next

Include any attachments here as appropriate.

Click next to advance to the review step.

Employee Access

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Home

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Team time

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My information

My pay

My career

My expense reports

New expense claim

Claim details

2 Per unit

Attachments

4 Review

Attachments

Drag files here or

Select files

0/50

Save for later

Previous

Next

Now review all the claim details, including per unit expenses and attachments.

If desired, use the previous button to return to the previous steps and make changes.

At any time prior to submission, you can click **save for later** to save your progress in case you want to come back later to complete the expense claim.

If everything looks good, click **submit**.

Employee Access

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My career

My expense reports

New expense claim

Claim details

Per unit

Attachments

Review

Review

Claim Details

Claim type	Expense Date	Employee	Activity Description
Expense Reimbursement	03/31/2025	Abbott, Peter Jaybird	Travel
Notes	PCard	PCard Vendor	Pre-Approval
Travel Expense...	No	n/a	No
Department	Business and Finance Services		

Per unit expenses \$108.00

Attachments

Total claim amount \$108.00

Save for later

Previous

Submit

Mark **check to confirm** and then click **Okay** to submit the claim into the approval queue.

The screenshot shows a web application interface for submitting an expense claim. The top navigation bar is dark blue with the text 'Employee Access' and a user profile icon. The left sidebar contains a menu with 'Home', 'MANAGER ACCESS' (Team overview, Team time), and 'EMPLOYEE ACCESS' (My information, My pay, My career, My expense reports). The main content area is titled 'New expense claim' and features a progress bar with four steps: 1. Claim details (checked), 2. Per unit, 3. Attachments, and 4. Review (highlighted). Below the progress bar, the text 'Expense claim is saving' is visible. At the bottom of the form are buttons for 'Save for later', 'Previous', and 'Submit'. A white confirmation modal is centered on the screen, titled 'Confirmation', with the text 'Confirm expense submission'. It contains a checked checkbox labeled 'Check to confirm' and two buttons at the bottom: 'Cancel' and 'OK' (which is being clicked by a mouse cursor).

Employee Access

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Home

MANAGER ACCESS

- Team overview
- Team time

EMPLOYEE ACCESS

- My information
- My pay
- My career
- My expense reports

New expense claim

1 Claim details 2 Per unit 3 Attachments 4 Review

Expense claim is saving

Save for later Previous Submit

Confirmation

Confirm expense submission

☒ Check to confirm

Cancel OK

The new expense claim now displays and shows a status of In Progress.

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My expense reports

Add claim

What do you want to do?
Search by claim number, next approver or employee

Filter

My claims

Next Approver: AP

In progress

Claim number: 186
03/31/2025
Employee: Abbott, Peter Jaybird

\$108.00

Next Approver: AP

In progress


Claim number: 185
03/31/2025
Employee: Abbott, Peter Jaybird

\$108.00

Next Approver: Orig

Open

Claim number: 183
03/06/2025
Employee: Abbott, Peter Jaybird



Select a claim to review.