

❖ Why were the templates reduced?

- To simplify the expense reimbursement process, expense templates were consolidated into Travel and Non-Travel templates, with a reduced list of expense types under each template.

❖ What resources are available?

- An updated **Expense Types** QRG is available. It details which Expense Types are available in each Template and provides a crosswalk for expense types no longer in use.

❖ How will the expense auditor know what the “Travel-Other” expense is if descriptions are no longer required?

- The new Travel-Other expense type WILL require a description that lists what the expense is for (i.e., tolls, rental car fuel, airfare bag fees, etc.)

❖ Can I group my “Travel-Other” expense as a single lump sum expense item?

- If you have multiple expenses that fall in this new category, they SHOULD NOT be bundled/grouped together.
- A separate expense item must be entered for each expense so that a proper description and matching receipt can be included:
 - This aids in review, as the system will calculate the total amount based on each individual expense and eliminates the need for reviewers to manually calculate the total.
 - It also allows for the system receipt thresholds to function properly.

❖ Now that “Business Meals/Hospitality” is no longer broken down by the number of attendees, is it still a requirement to list the names of the people in attendance?

- A new field for **Number of Attendees** has been added and is a required field.
- The **Description** field should include the business purpose for the meal and the topics discussed.
- When possible, in the **Description of Group** field, please include attendee names and affiliations, or attach a list on the expense item.
- If the group consists of a large number of individuals, a description of the group may be provided in lieu of names and affiliations.

❖ How will my expenses be properly accounted for on my grant?

- The **Expenditure Type** field is now available for selection on an expense report, to ensure that grant expenses are categorized correctly.