**When to submit an Expense Report**

**Overnight Travel by an employee** – One expense report per trip is required and must be submitted within 45 days of the completion of the trip. Extended trips lasting over 30 days can be broken up and submitted on multiple expense reports (i.e., 1st 2 weeks submitted on one report and the 2nd two weeks submitted on a second report). This is not required if the complete report contains less than 20 transactions. If any expense report contains more than 20 transactions you are required to submit multiple reports.

**Local Travel and expenses by an employee** – One expense report per month is required if any local travel or local expenses are incurred. This report must be submitted within 15 days of the last day of the month that the expenses were incurred (i.e., Oct 2015 mileage and local expenses must be submitted no later than the 15th of Nov 2015). It is reasonable, in most cases, that since these transactions are all local the need for 45 days to prepare and submit the report is unnecessary . If any expense report contains more than 20 transactions you are required to submit multiple reports.

**Departmental T&E expenses** – One expense report per month is required for all departmental t&e expenses incurred. This report must be submitted within 15 days of the last day of the month that the expenses were incurred (i.e., Oct 2015 Dept T&E Expenses must be submitted no later than the 15th of November). If any expense report contains more than 20 transactions you are required to submit multiple reports.

**To maintain consistency in report naming conventions, we require the following be included in the Report Name Field**

Overnight Travel - Report name must include the name of the month and year of the actual expense(s) with the destination followed by the employee name (i.e., Oct 15 San Francisco Sue Smith)

Local Travel and expenses – Report name must include the name of the month and year of the actual expense(s) with local expenses followed by the employee name (i.e., Oct15 local expenses/mileage Sue Smith)

Departmental T&E Expenses – Report name must include the name of the month and year of the actual expense with Dept Expenses followed by the employee name (i.e., Oct 15 dept expenses Sue Smith)

**Business Purpose Field (Expense Header)**

The business purpose field on the expense header will default to the business purpose field on each expense line item. Therefore, each business purpose field at the line item of the specific expense will either need to be modified to detail the individual expense or a comment must be included to document the individual expense(i.e., taxi from airport to hotel to attend the ABC Conference or mileage to clinic in Baton Rouge for review of resident training ).

The Business Purpose field on the Expense Header should also include the name of the month and year as well as a brief indication of what is included on the expense report (i.e., Oct 15 dept expenses or Oct15 AACP Conf expenses).