TEM Quick Sheet – Creating a Reimbursement (TR) Based on an Approved Travel Authorization (TA)

This sheet provides an overview of how to create a reimbursement (TR) based on an approved Travel Authorization (TA). A more comprehensive and illustrated explanation of this process is covered in the **TEM Traveler & Delegate User Guide**, which is available online (http://www.wwu.edu/bs/travel/tem/resources.shtml). This process is also covered in the **Traveler & Delegate Training Class**. You can sign up for classes via the WWU Training Site (http://west.wwu.edu/training/); look for the course under **Financial Systems**. If you have any other questions or concerns, please don't hesitate to contact Samantha or Devlin at:

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Log Into TEM
• Access TEM from myWestern, the TEM homepage, or directly from this url: https://tvlwwis.wwu.edu/tvlexp/tvlexp-flex/index.html • Log in with your Universal username and password, if prompted
Create Your New TR
• Open the **Expense Manager** tab and then go to your **Authorization Reports** list • Find the **approved** TA for the trip you want to create a reimbursement (TR) for • Select the TA by clicking it once, then click the **Generate Expense Report** button in lower-right corner • When presented with the Generate Expense Report screen, modify the Report Name and Affiliation if necessary, but **DO NOT** change the default Report Date • Click the **Save** button the Generate Expense Report screen when finished
Open and Modify Your New TR
• Open the Expense Manager tab and go to your Expense Reports list • Locate your newly created reimbursement (TR) and open it • Use the section headers on the left-hand side of the screen to navigate to the respective areas of your TR that you would like to modify (e.g. General Information, Itinerary, Expenses, Comments, etc.) • Modify the estimates transferred into your TR until they reflect the actual dates/times, expenses, etc. that occurred during the trip
Finalize and Submit your TA
• Click on the **View or Submit Report** button in the lower-right corner of the screen • Review the information entered on your TR, revise as necessary • Use the "attachments" section header from the left side of the screen to attach any necessary backup documentation (e.g. receipts) • Submit your TR by clicking the **Submit** button