EXPENSE REPORT TIPS

BUSINESS PURPOSE - Documentation of a clear business purpose is required so an approver, reviewer and /or auditor will reasonably conclude and agree that the expenditure is an appropriate business expense. Expenditures that have or may have some personal use or personal benefit will require a much higher level of substantiation of the business purpose. It is helpful to include program or event names for which items were purchased, and avoid using acronyms. It is also useful to have receipts signed by supervisors or department heads prior to uploading them when a purchase looks unusual.

MEALS NOT RELATED TO TRAVEL – When meals are purchased for a program, event, or celebration, clearly describe the event and its business purpose. Explanations such as “research”, “business meeting” or “lunch meeting” are NOT sufficient explanations of business purposes. Meals with other Emory employees are generally not reimbursable. Meals with Emory colleagues should be considered a personal expense unless one of the following is true:

   a) a non-Emory employee is also present and business is being conducted;
   b) the meal is in honor of an Emory employee's beginning or ending of employment at Emory or other significant Emory or professional achievement;
   c) business being conducted among Emory employees is such that it cannot be done in the office or another time. (An explanation of the reason why the meeting could not take place in the office must accompany the reimbursement/expense request); or
   d) rare or atypical instances where, with approval of a supervisor, employees may work during normal meal breaks with other employees, e.g., working lunches.

If the number of attendees is under ten, a list of names and affiliation (alumnus, recruit, etc.) is required. When the number is ten or greater, please indicate that in the description.

HOTEL BILL ITEMIZATION – Hotel bills that include anything other than the room charge and associated taxes and fees need to be itemized. Parking and meals, for example, should be placed on their own expense line.

EXPENSE CATEGORY – Compass will assign an expense category based on merchant name, but it is not always the best option. If a more appropriate expense category is available, please correct it. It is usually easier to change expense type while charges are still sitting in “my wallet”. For example, do not use “Travel-Other” for parking or “Other Reimbursements” for registration fees.

GIFT CARDS – Gift cards should NOT be purchased with a p-card or corporate card. Emory’s preferred method is to purchase them through Emory Express. When gift cards are given to employees, student employees included, the purchase must be reported through the gift reporting system. Please refer to the Campus Life Finance web page, or the Emory Finance web page for details concerning the purchase of gift cards and their reporting requirements.