

Workday Employee Travel & Expense FAQs

1. How do I access Workday Employee Travel & Expense?

Go to <https://www.myworkday.com/neiu>

2. Are there any training resources available for using Workday Employee Travel & Expense?

Go to <https://workday.neiu.edu/travelexpenses>

3. What should I do if I encounter technical issues with Workday Employee Travel & Expense?

Please reach out to helpdesk@neiu.edu

4. Can I make changes to a submitted spend authorization or expense report?

Yes, employee can make changes as long as the travel spend authorization or expense report is not yet closed or paid.

5. Do Local Travel and Conferences and Registration Fees require Spend Authorization?

Only Conferences and Registration Fees will require a Spend Authorization. Starting October 12, 2023, mileage reimbursement in the Chicago Metropolitan Area which includes Cook, DuPage, Kane, Lake, McHenry, and Will counties will no longer require a Spend Authorization. To request reimbursement, employees should use the new expense item named, "Mileage (Chicago Metro Area)," when creating an Expense Report in Workday.

6. How do I create an expense report for another employee?

Employee must go to “Create Spend Authorization for Worker” and “Create Expense Report for Worker”. To access these tasks in Workday, Employee must have the role Expense Report Data Entry Specialist. Please reach out to UTS Help Desk at helpdesk@neiu.edu or x4357 with subject Expense Report Data Entry Specialist.

7. Travel Authorization Request and Encumbrance is approved by an employee’s Supervisor. Will the Spend Authorization in Workday be also approved by an employee’s Supervisor?

Yes, the Controller’s Office added a Supervisor approval in the approval workflow on August 14, 2023.

8. How can I change the Fund Manager and Cost Center Manager Approver for Workday Expense?

Currently, Fund Manager and Cost Center Manager Approver roles are based on the Financial Manager. The Approver can be changed to an authorized alternate in Workday Expense. Please reach out to UTS Help Desk at helpdesk@neiu.edu or x4357 with subject Fund Manager and Cost Center Manager Approver.

9. Can I get reimbursed for hotel expenses within Chicago?

University employees are typically not reimbursed for hotel expenses within the Chicago metropolitan area. Reimbursement is allowable with Vice President or President approval and certain conditions. Refer to policy F1.08.1 page [here](#).

10. Can employees fill out the Spend Authorization with a zero amount?

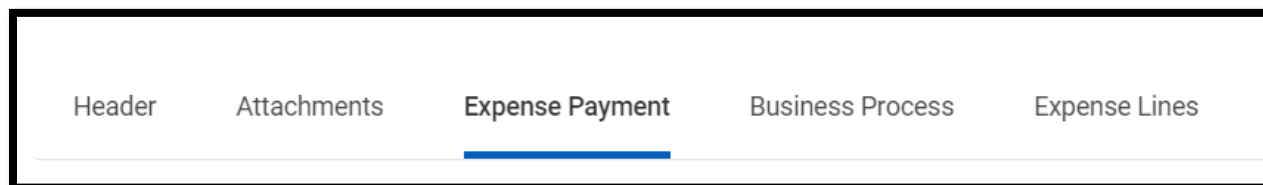
No, Workday does not allow a zero amount in the Spend Authorization. Employees must use the expense item “Travel Authorization” in the Spend Authorization for traveling on official business that are not using the University funds. No Expense Report is needed to be submitted against the Spend Authorization. The Controller’s Office will close the Spend Authorization related to Travel Authorization every month to avoid any problems in the Department’s budget.

11. We have employees visiting local schools during summer. Previously, employees were reimbursed by submitting a travel voucher every month for mileage reimbursement. How does this work in Workday?

Mileage reimbursement for employees using private passenger vehicles for university business will require the support of either a map from any internet program showing the departure and destination location or the NEIU formatted Mileage Reimbursement excel file located [here](#).

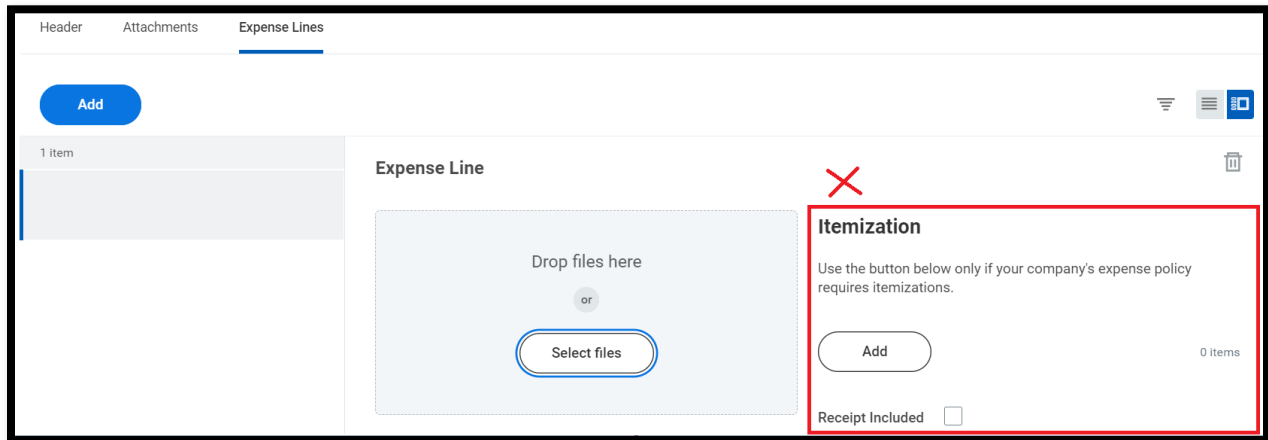
12. How do I check if I get reimburse?

Once an expense report is processed by Payroll Department, a new separate tab called “Expense Payment” will appear in the expense report and show all the information of the reimbursement. To view expense calendar, please click [here](#).



13. Do I need to use “Itemization” in an expense line item in an expense report?

Workday has an “Itemization” section in an expense line item. This is not required per expense line item. Employee can add one expense line item per Fund-Cost Center-Program combination.



14. Do I need to submit a Travel Claim Addendum Form?

No, a Travel Claim Addendum Form was used to provide a justification for exceptions to lodging rates set by IHETCB. With the shift to Workday, employees would no longer need to fill up this form. Employees can select the justification to the exception to lodging rates and attached the supporting documents in the Expense report

The following are justification to exceptions to lodging rates (only 1 can be selected in Workday Expense):

- Conference Hotel – if a Conference Hotel is selected, employees must provide back-up in the expense report showing that the selected hotel is part of the allowed hotels by the conference event. Example: a copy of a brochure or registration form or conference website which indicates the hotel in which the conference was held; or, if the conference is held somewhere other than the hotel, a list of the recommended hotels must be attached;

- Least costly – if selected under Classes of Service, employees must provide explanation and back-up that ground transportation makes alternative lodging uneconomical. Example: Cost of hotel room plus cost of Uber transportation is more than the cost of the selected hotel room
- No alternative – if selected under Classes of Service, employees must provide explanation and back-up that least costly room available in area. Example: Participating conference hotel is full and prices of all nearby hotel rooms within the area are higher than selected hotel room (Employees must make sure to check at least 3 hotels)
- Required location – if selected under Classes of Service, employees must provide explanation and back-up that selection is necessary to conduct University business.