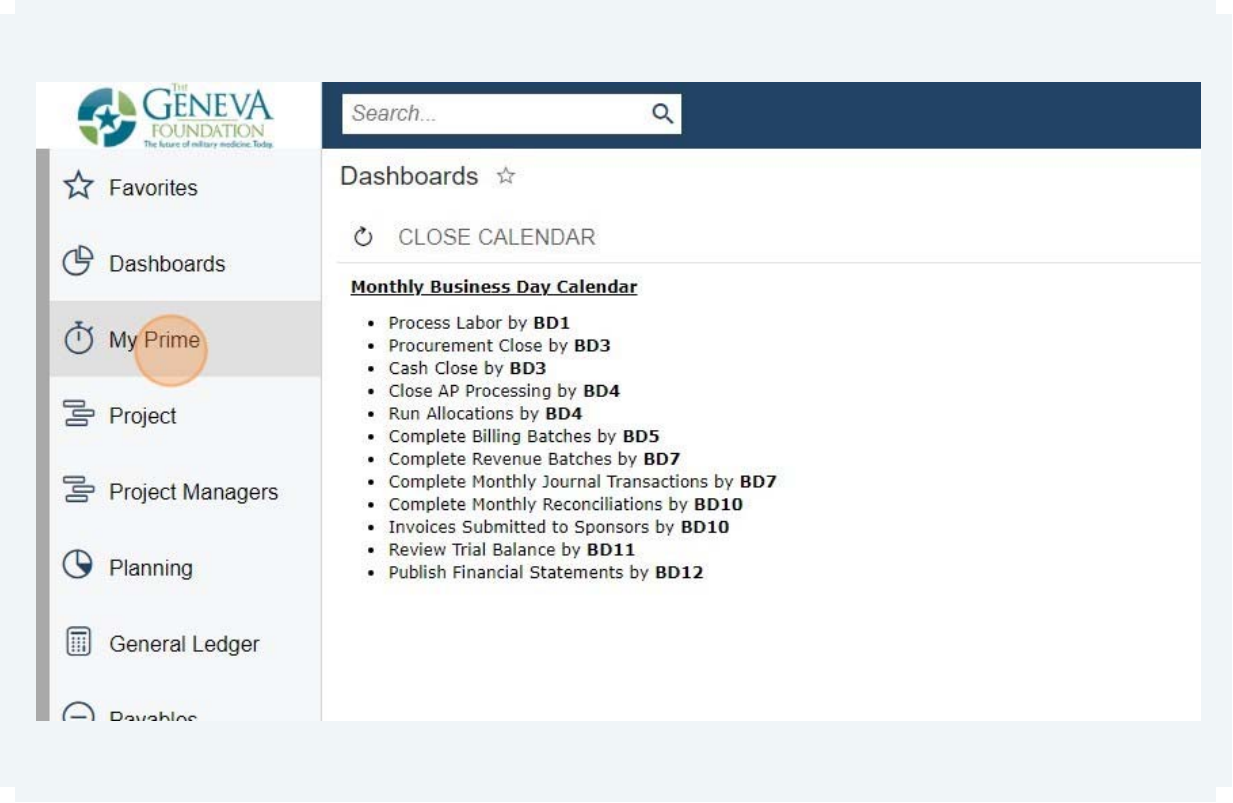
Step by Step Guide: How to Submit an Expense Report for Approval

REFERENCE GUIDE

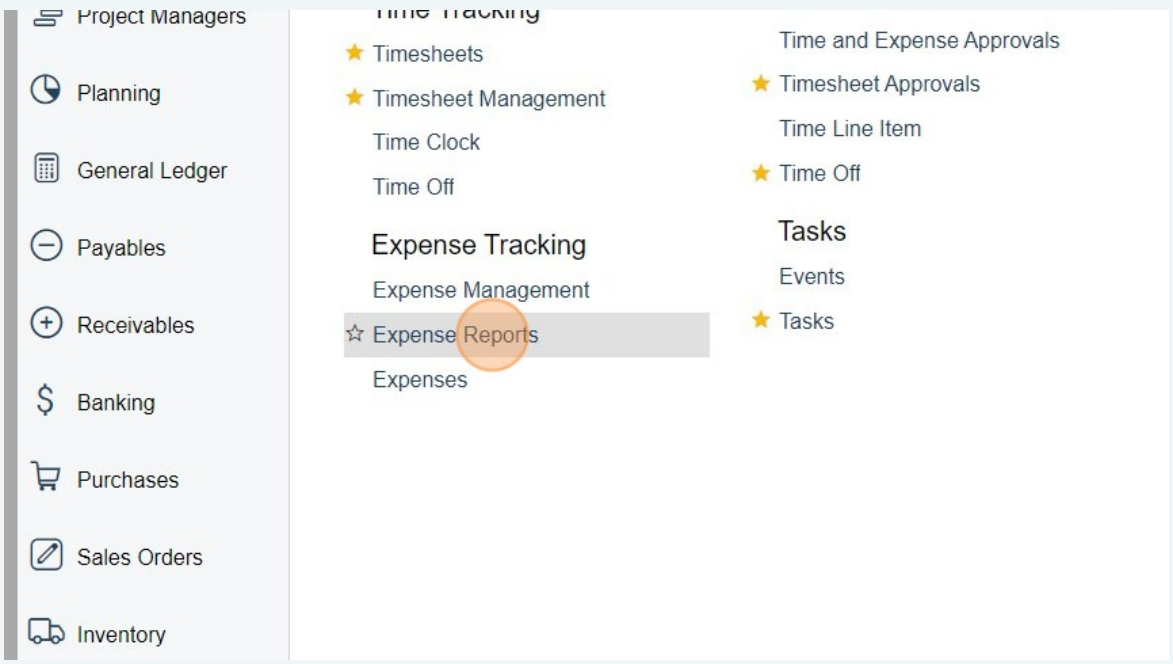
Table of Contents

Submitting an Expense Report in JAMIS

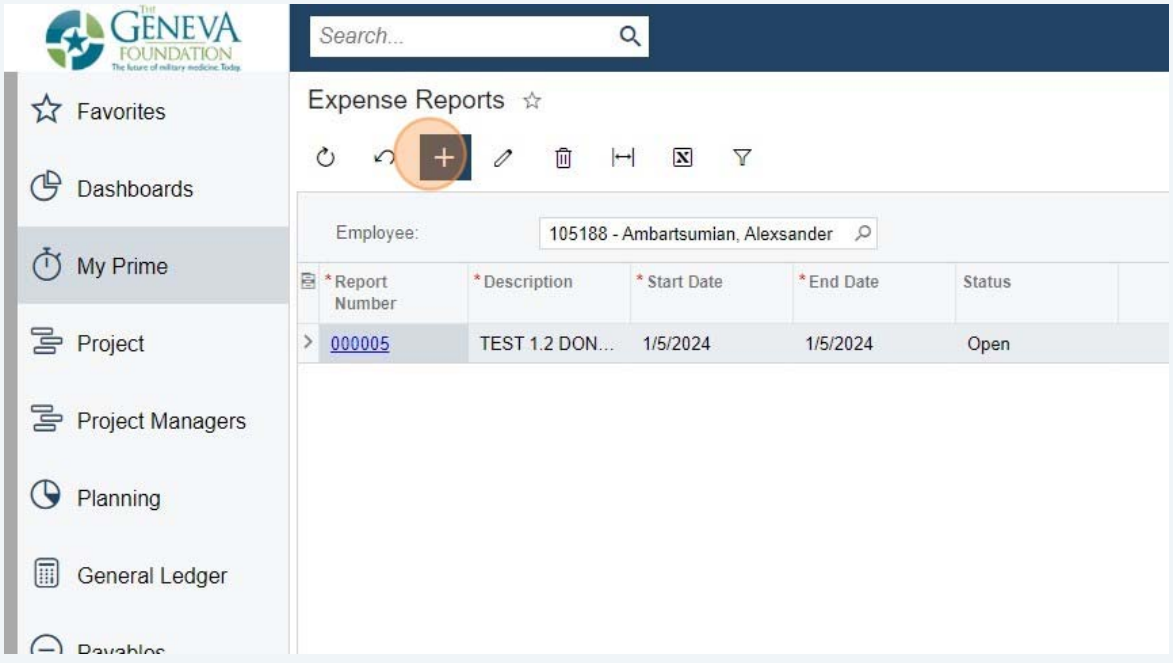
1. Navigate to “My Prime.”



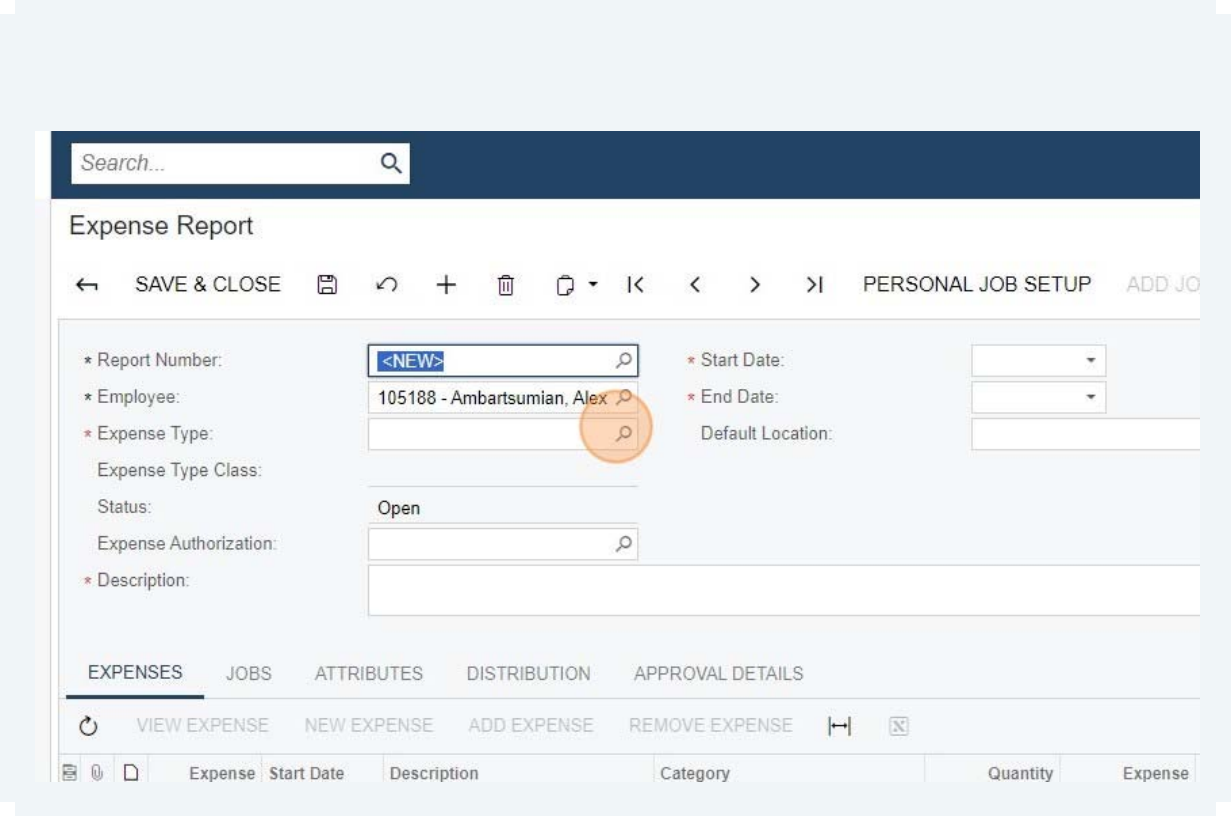
2. Click “Expense Reports.”



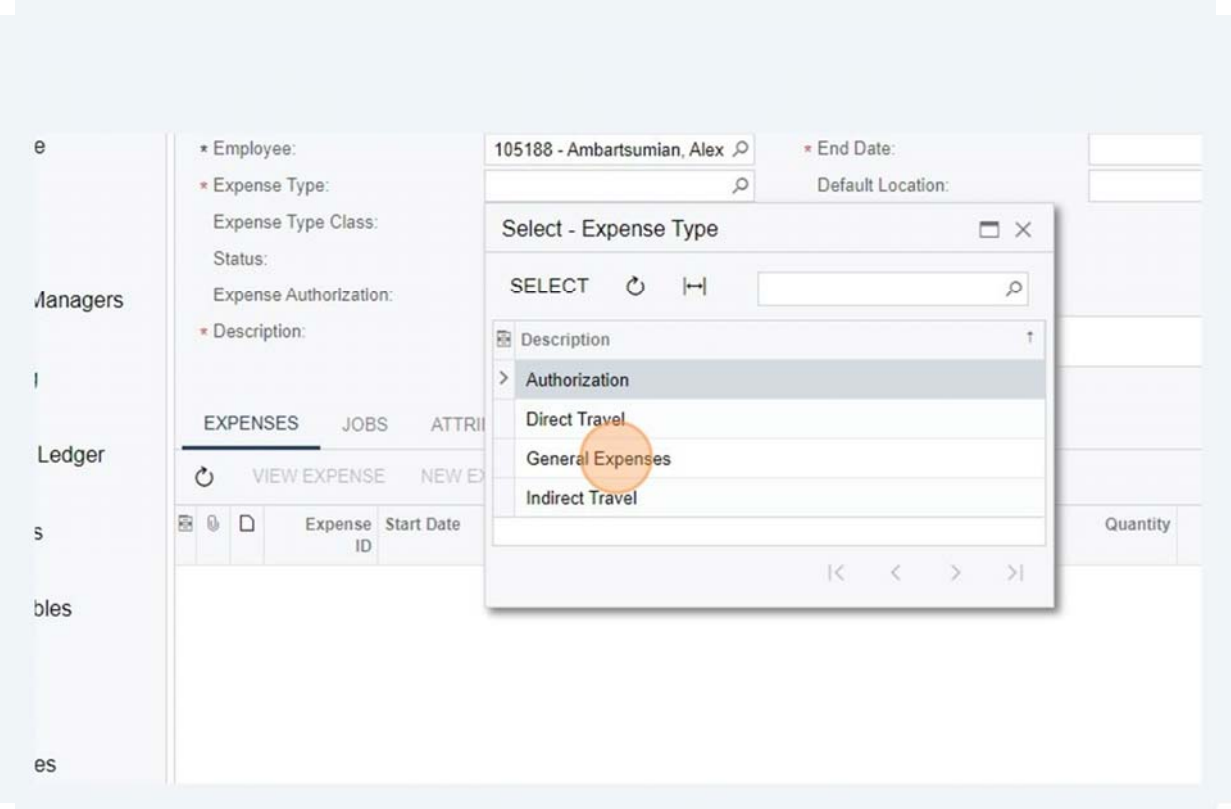
3. Click on the “+” sign to create a new expense report.



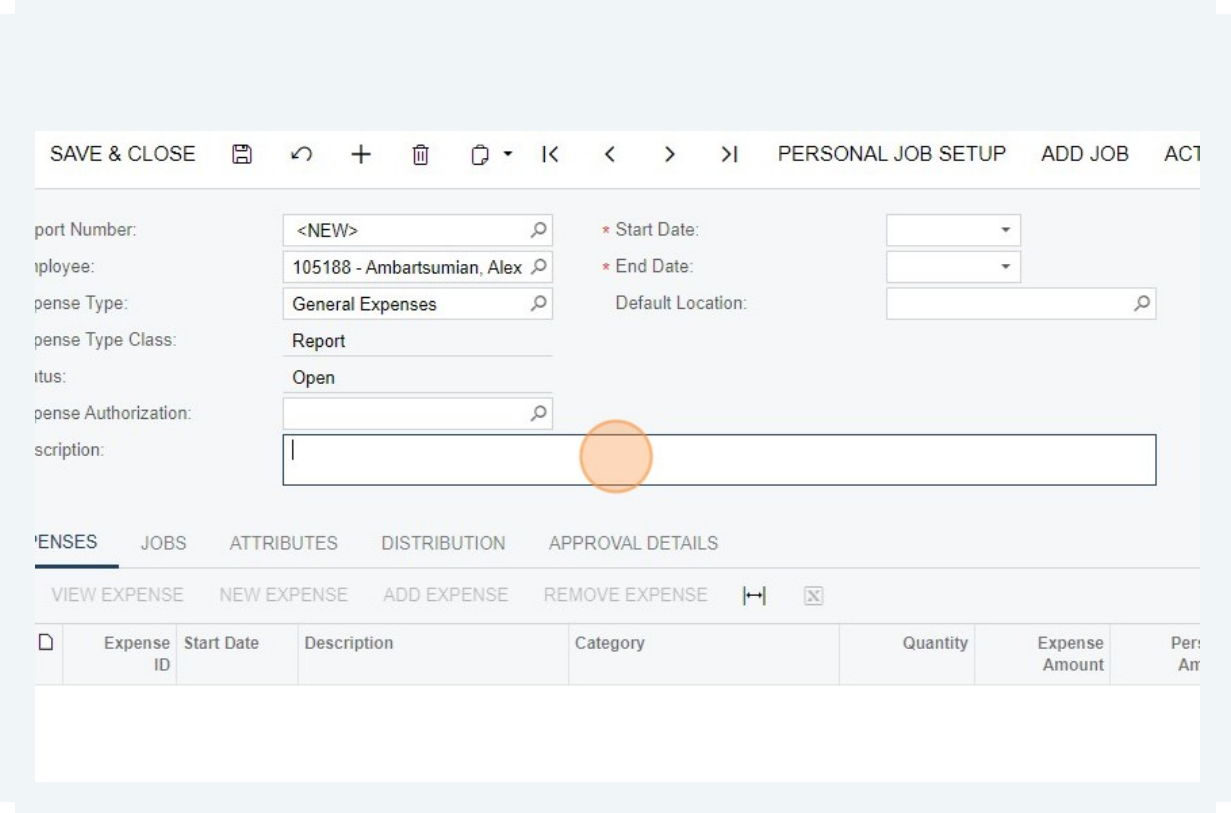
4. Fill in the “Expense Type.”



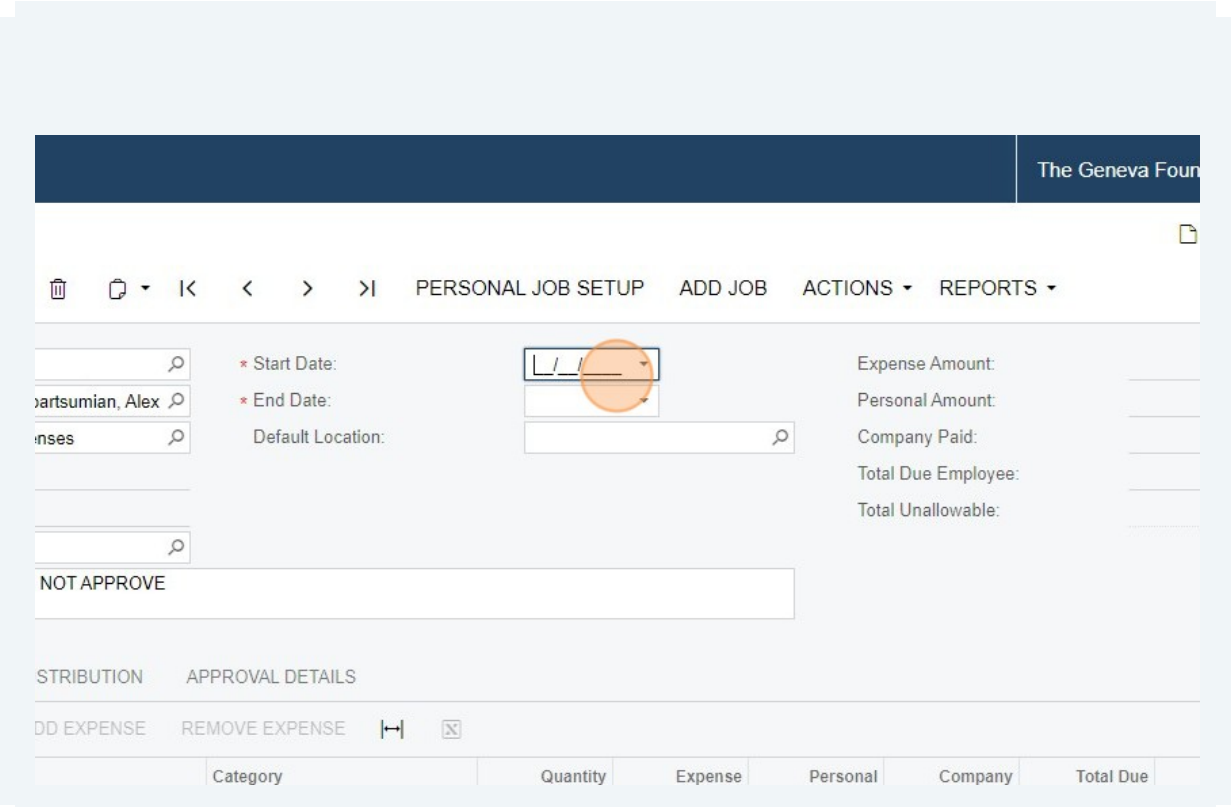
5. For General Expense, select “General Expense.” For travel, select “Direct Travel.”



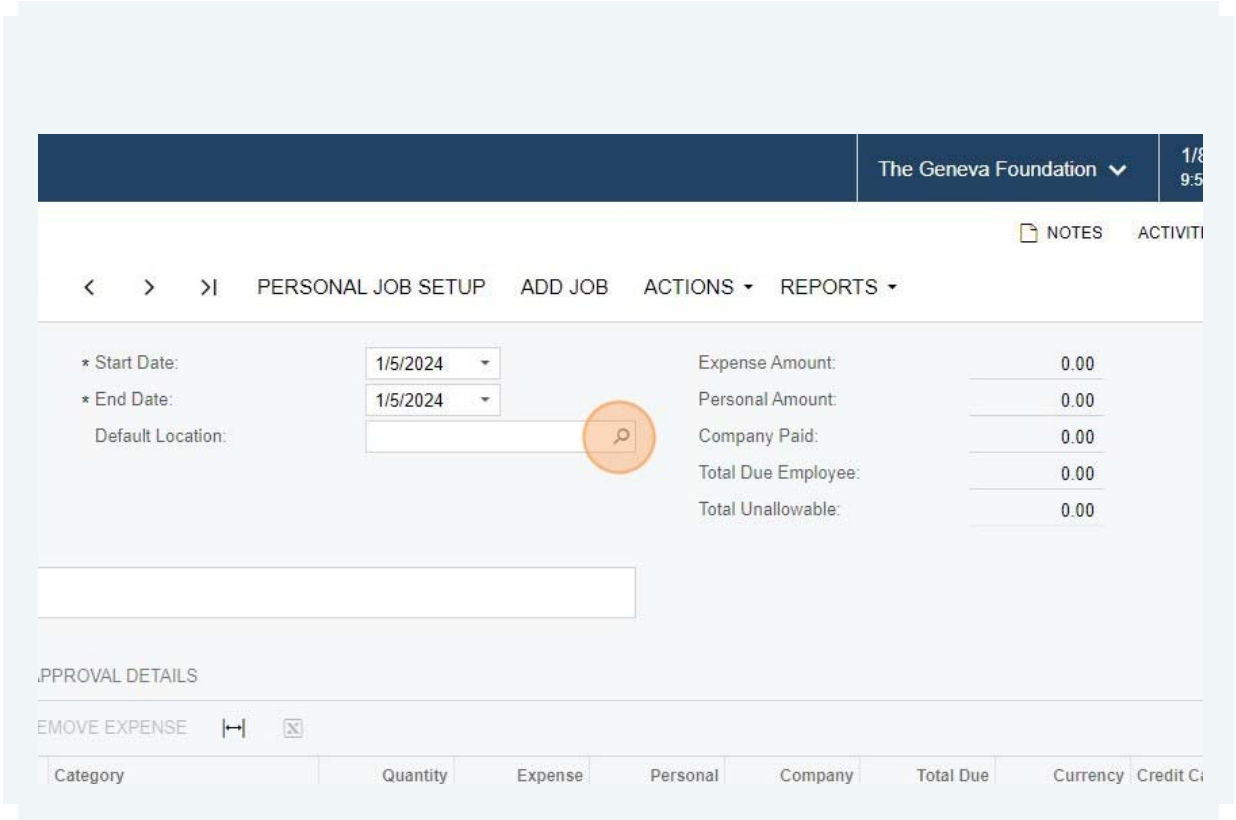
6. Fill out “Description Field” box.



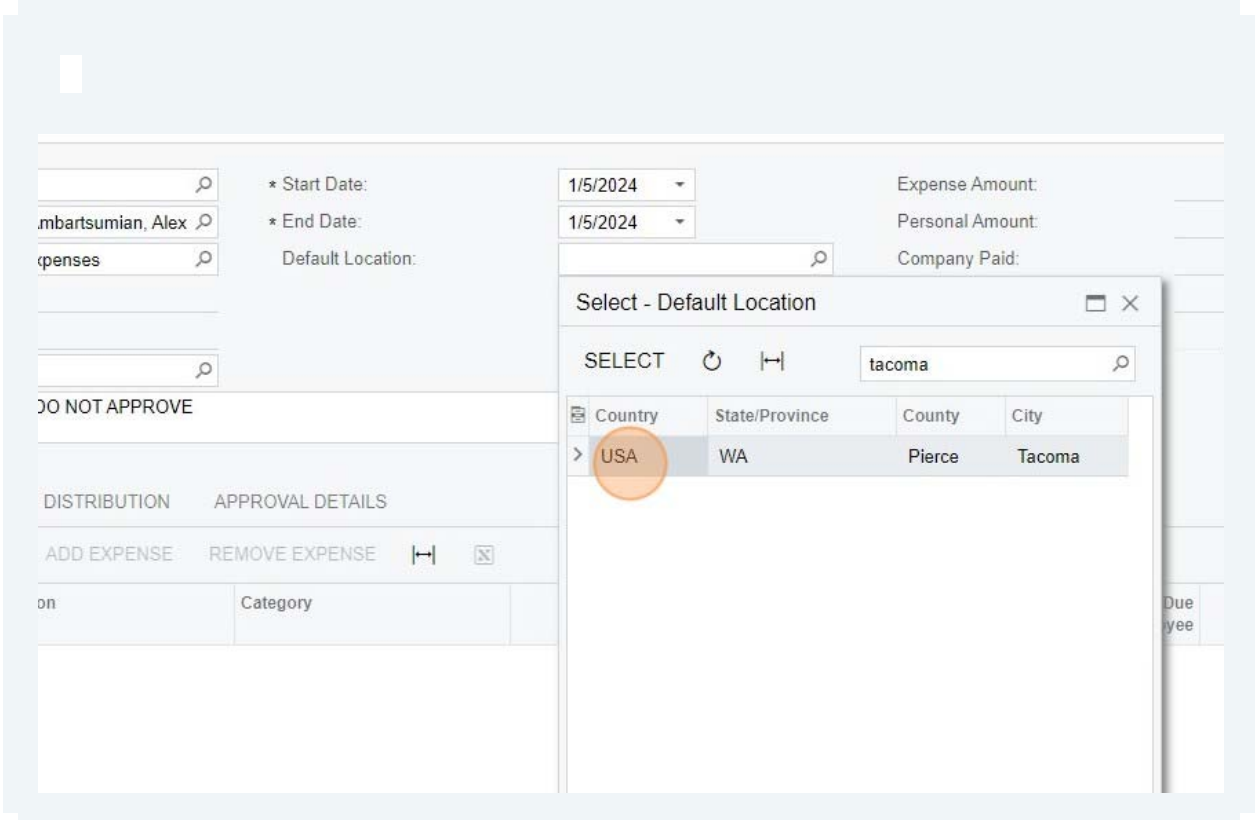
7. Select “Start” and “End Date.”



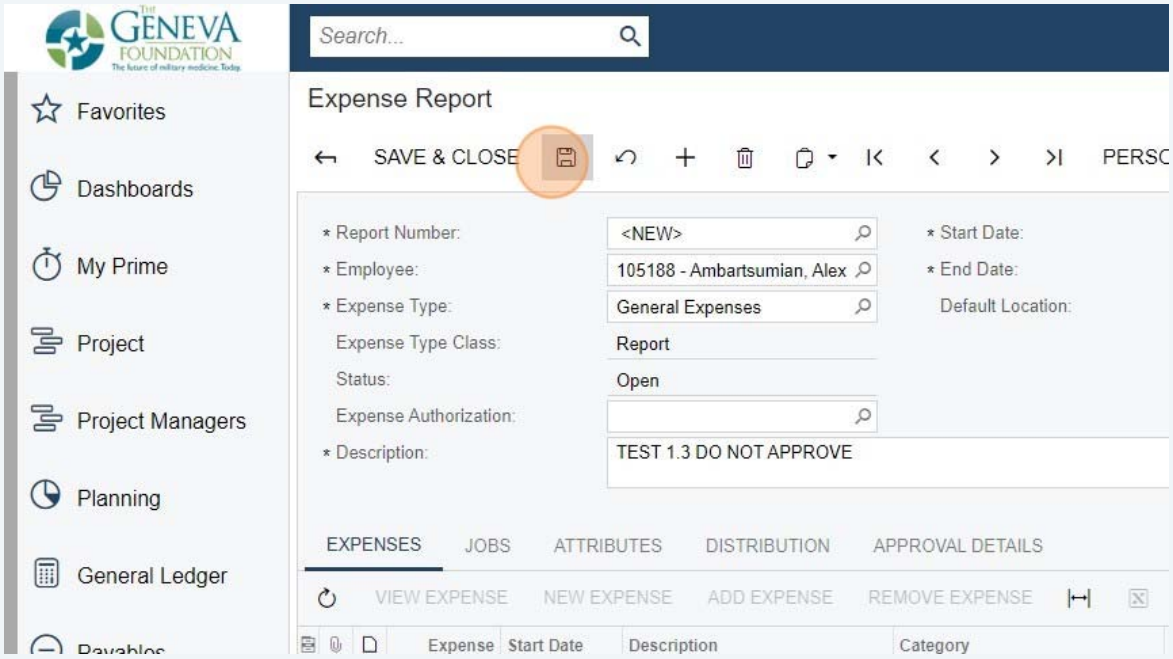
8. Fill in the “Default Location.”



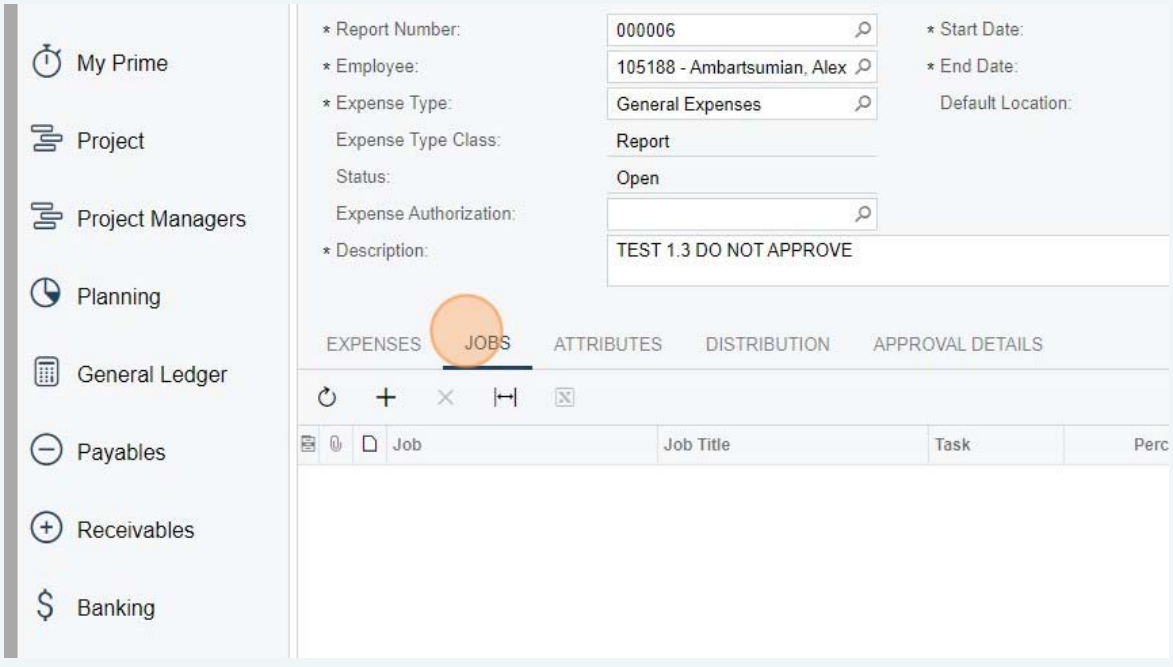
9. Select the location of Travel.



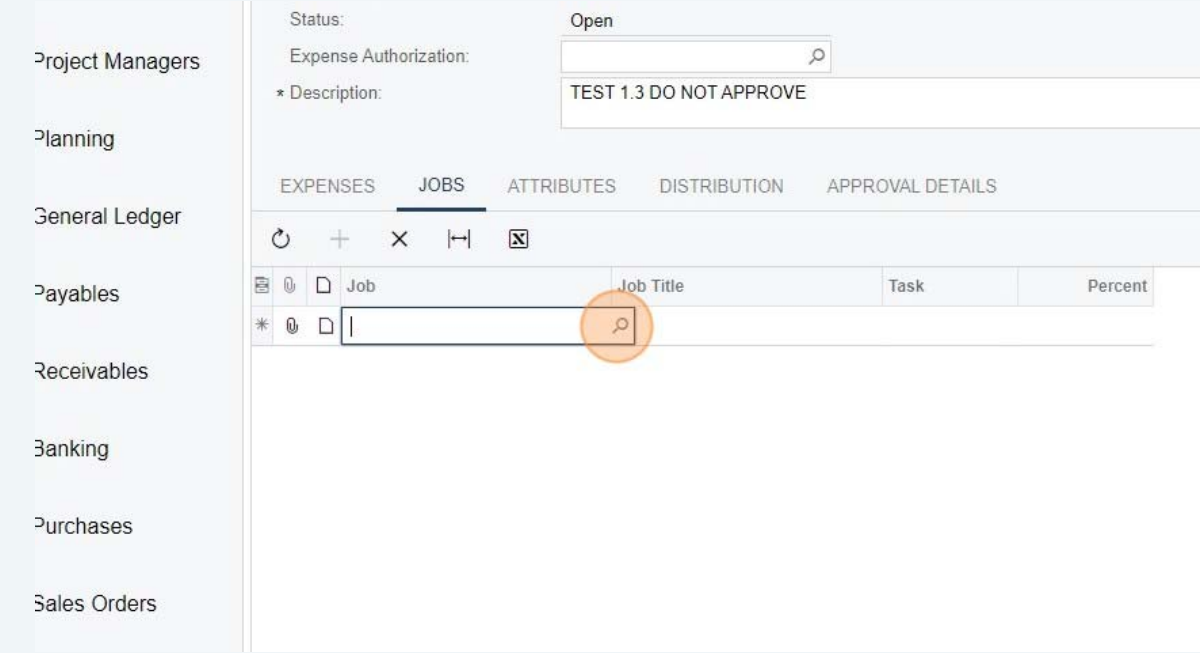
10. When all boxes are filled in, hit the save icon to save the expense report.



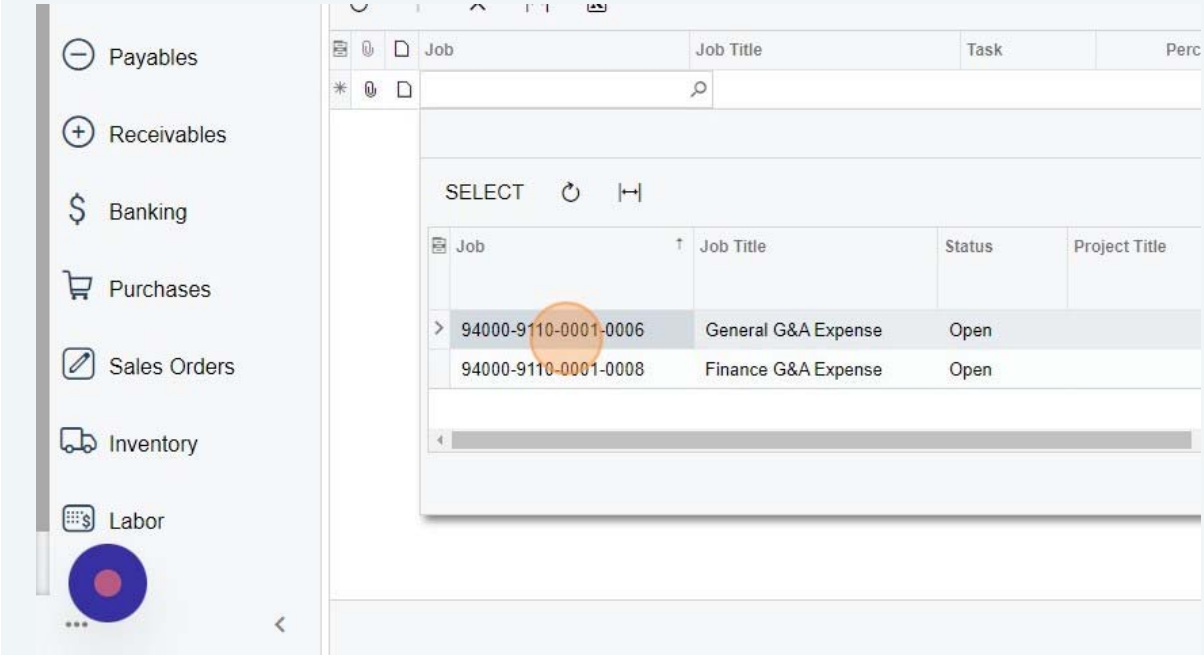
11. Once saved, go to the “Jobs” tab and enter in the job code that the expense should be billed to. This can be multiple job codes, if needed.



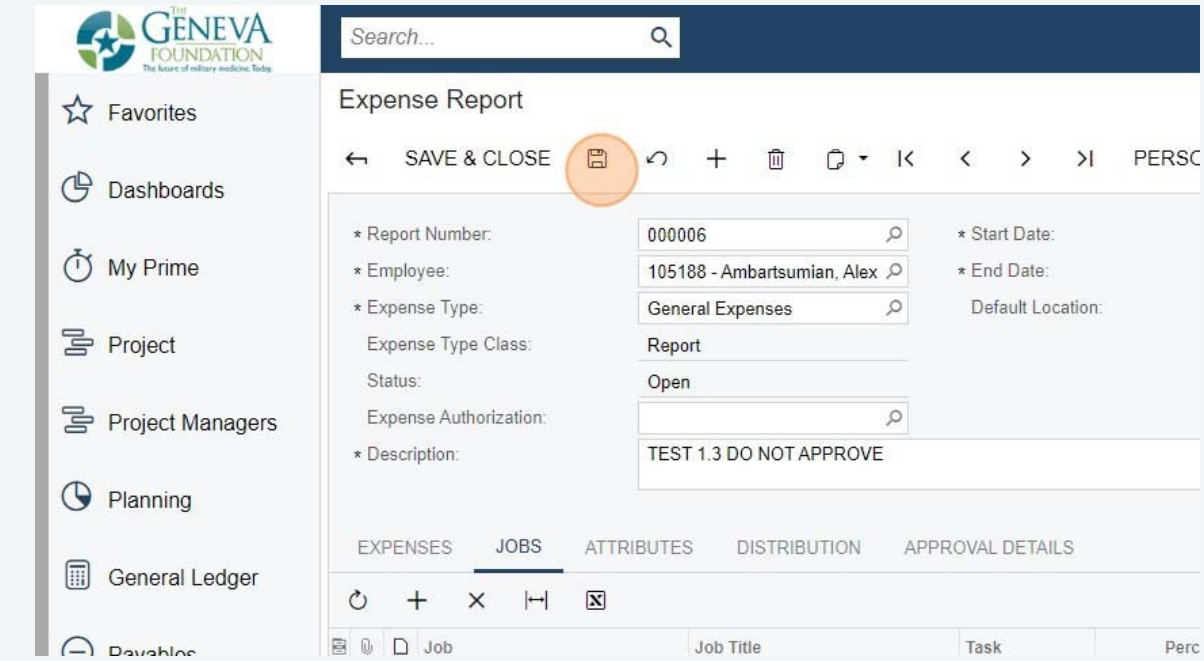
12. Job Selection Continued.



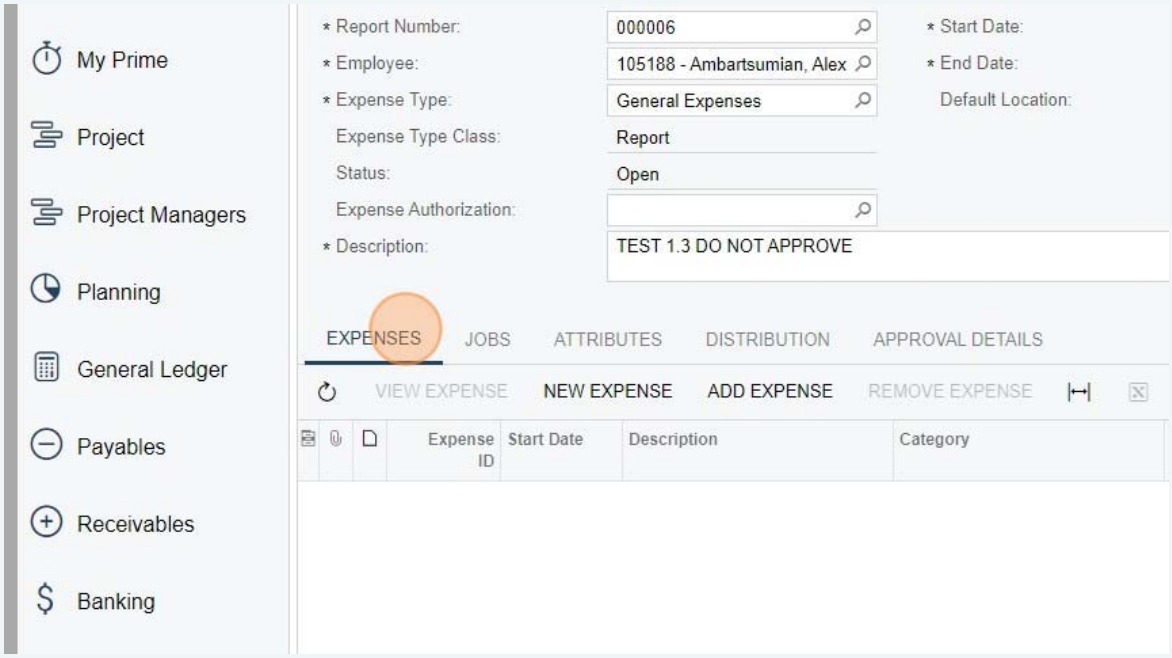
13. Job Selection Continued – the user will have access to all jobs that are available to them.



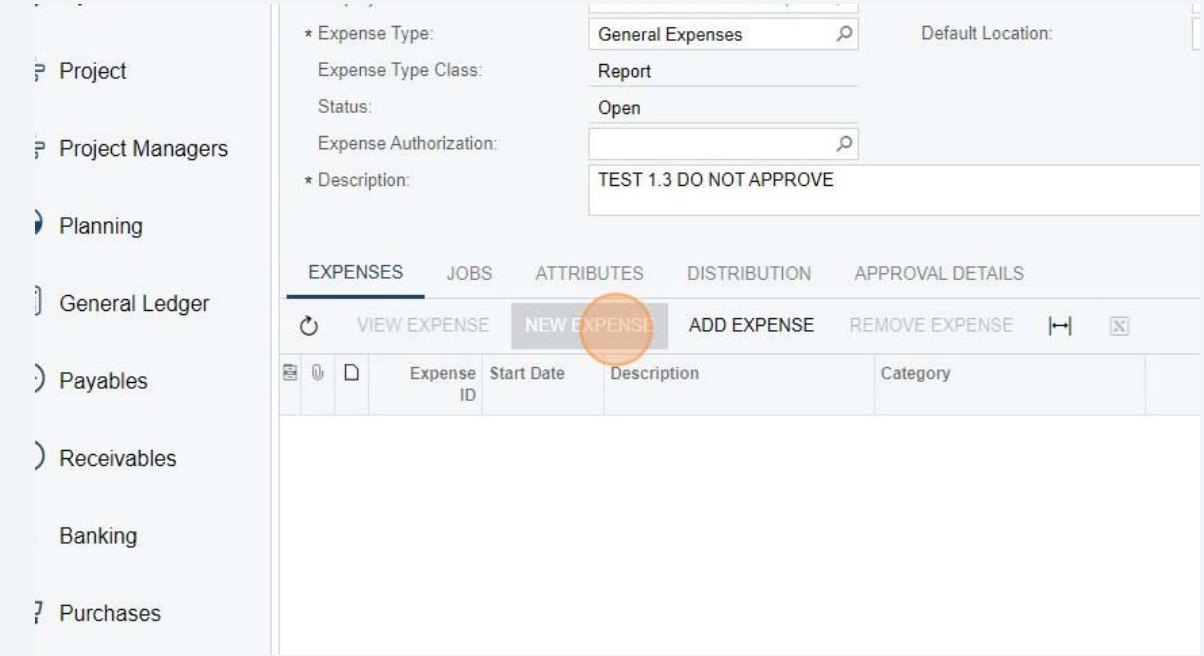
14. Click “save” again.



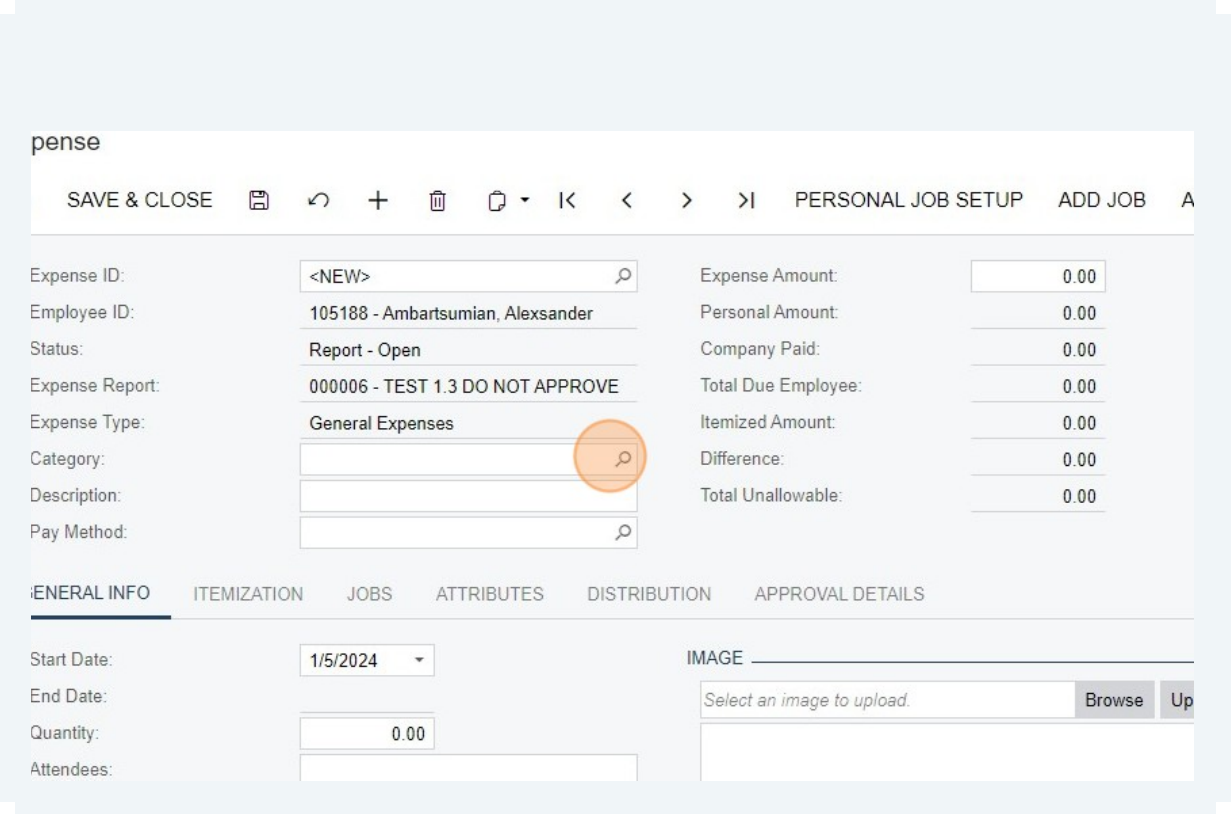
15. To add an expense to the expense report, click on “New Expense” under the “Expense” Tab.



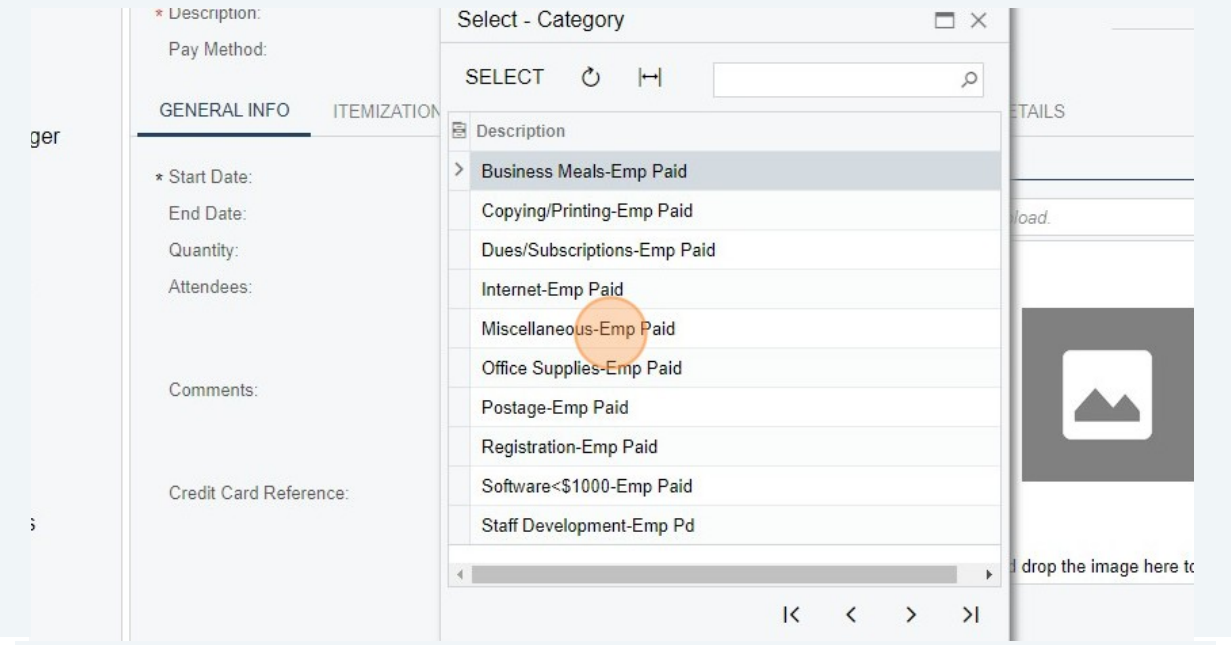
16. Adding Expense Continued.



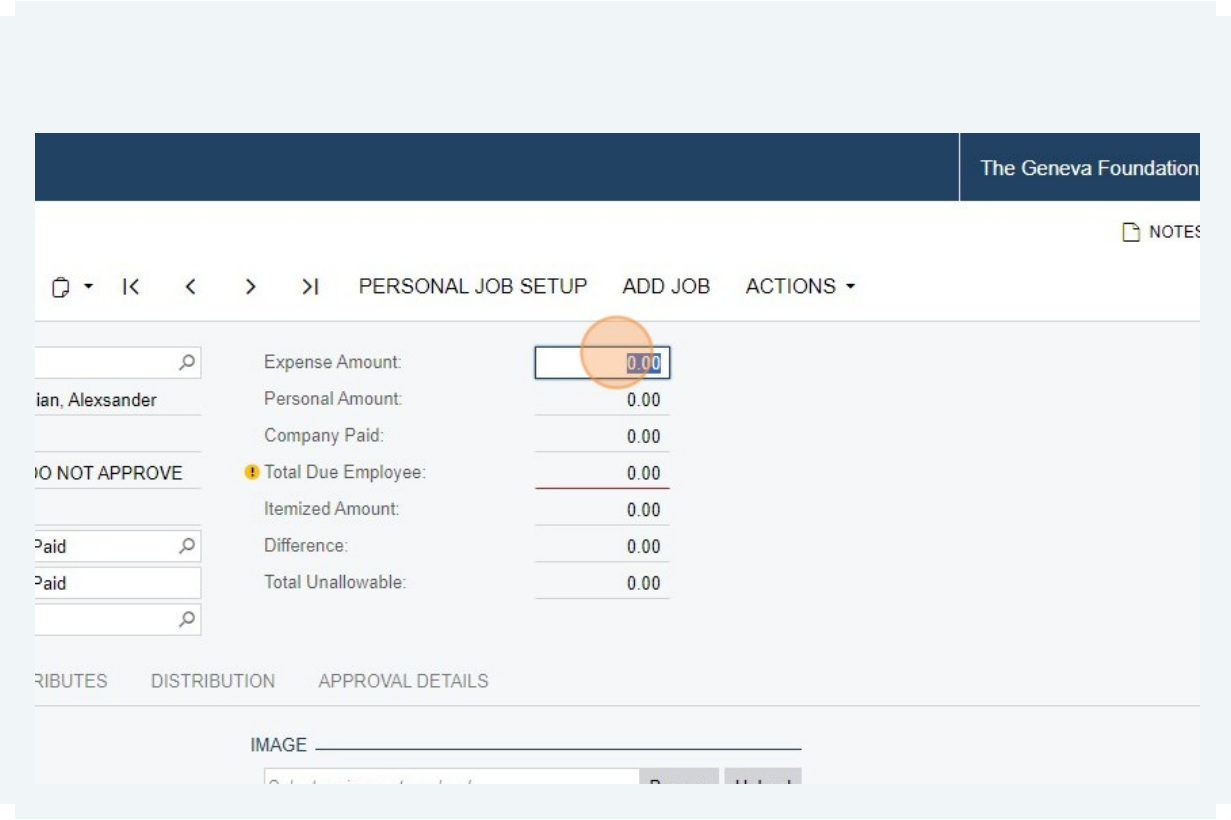
17. Fill in Category.



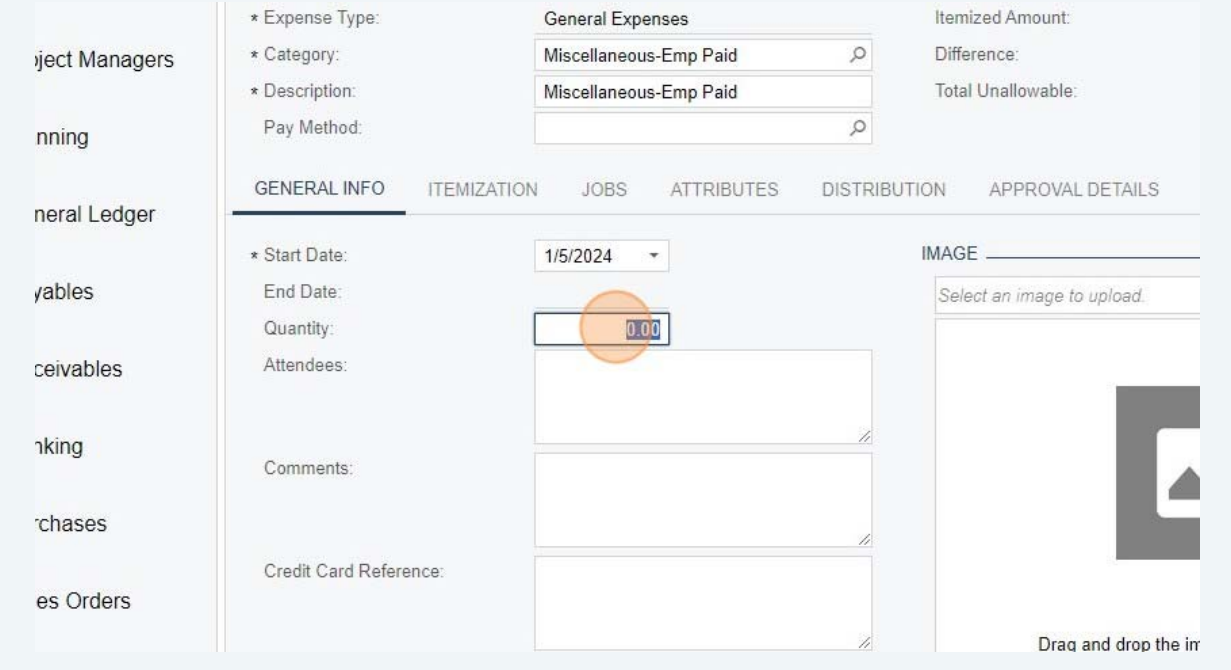
18. Selecting Category Continued. EMP Paid: employee paid items. Comp Paid: company paid items (Geneva pays before your travel).



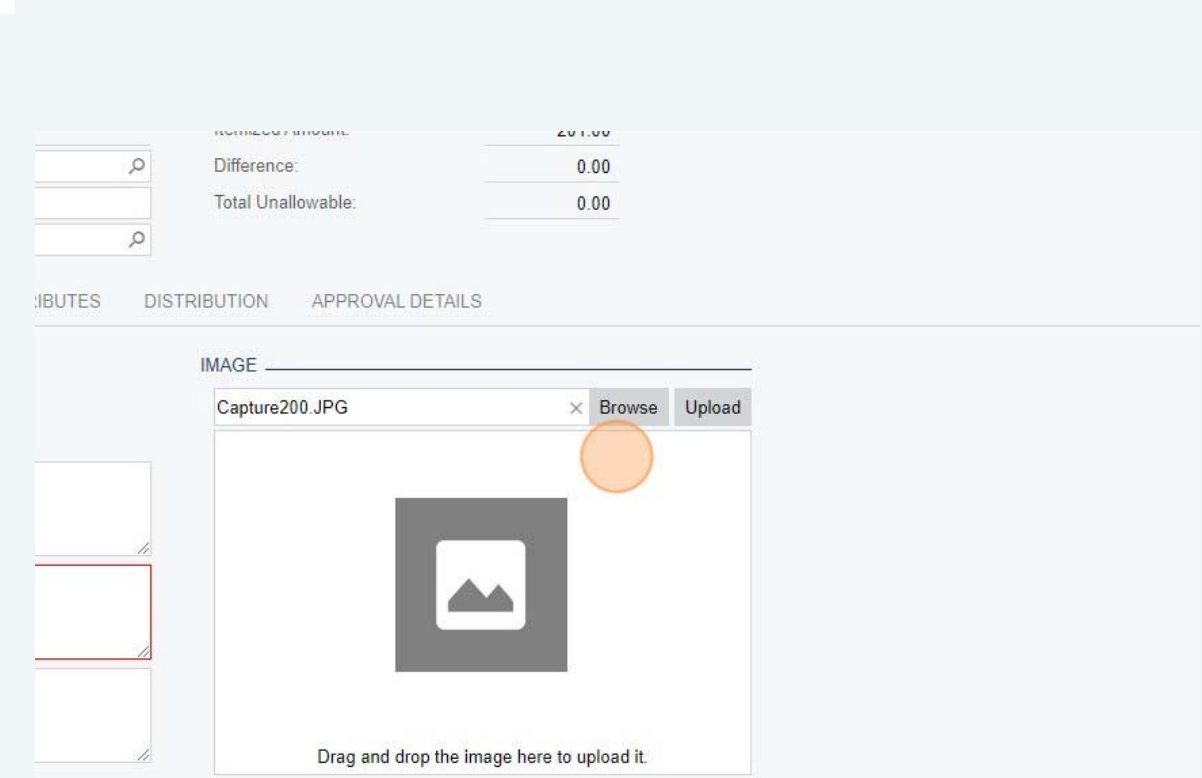
19. Fill in the expense amount.



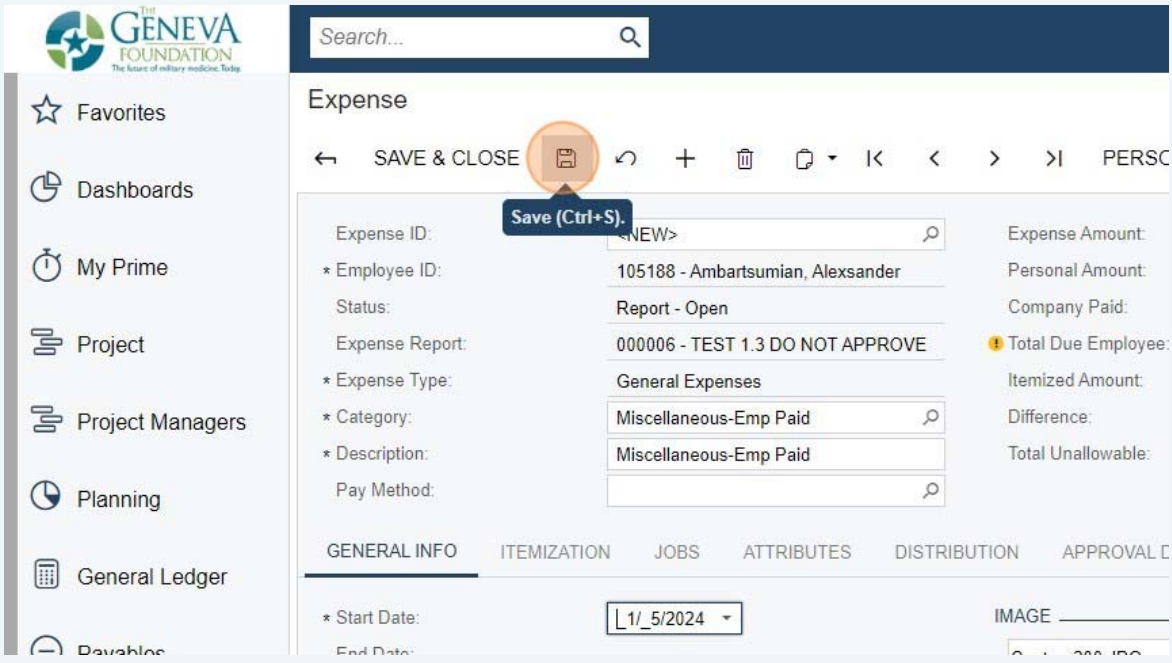
20. Fill in the quantity.



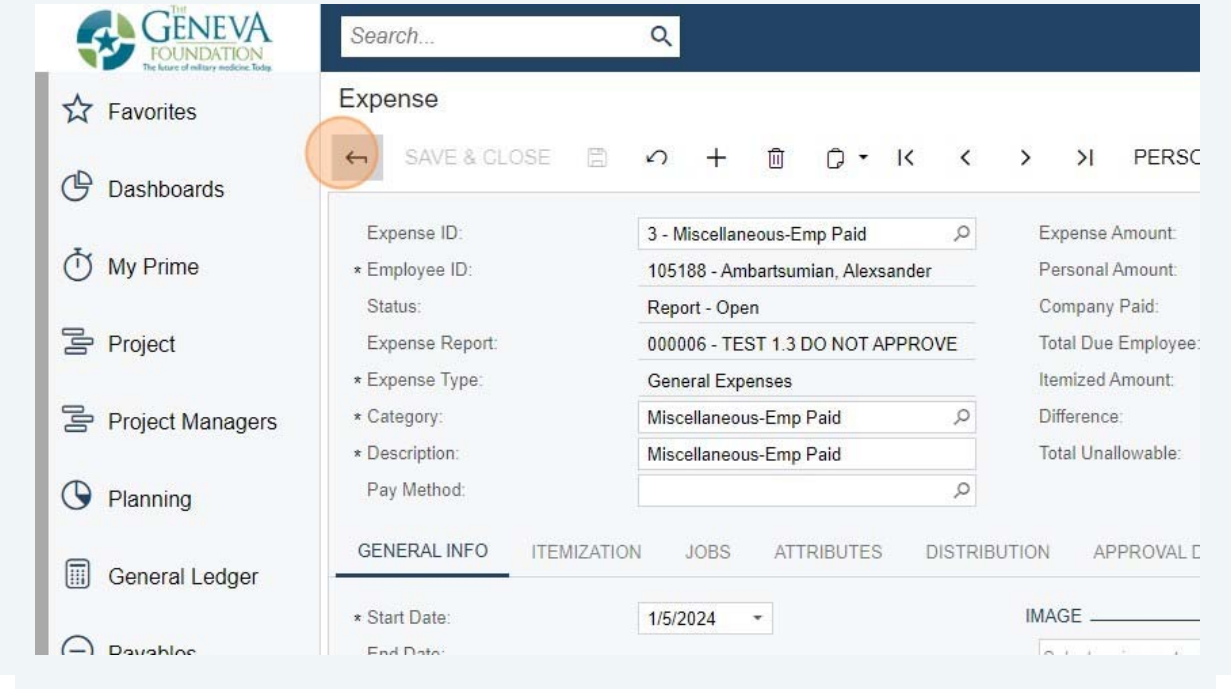
21. Attach a copy of your receipt – note that only a PDF or jpg is accepted.



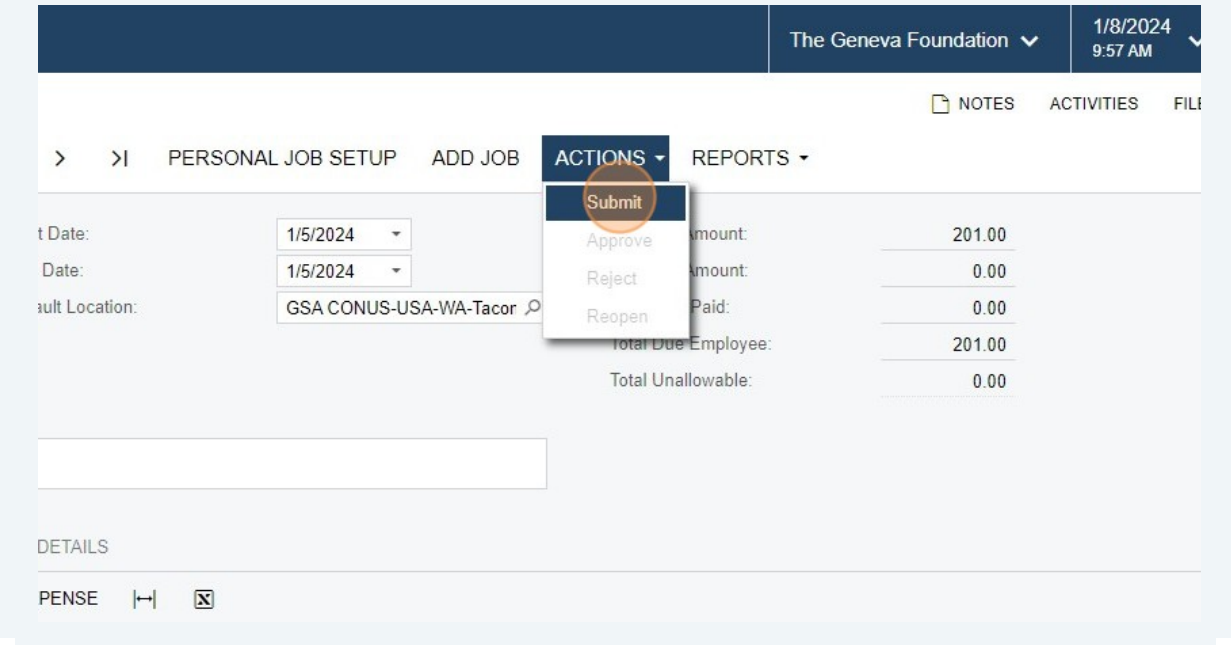
22. Click Save.



23. Once the Expense is entered, click the back arrow to return to the expense.

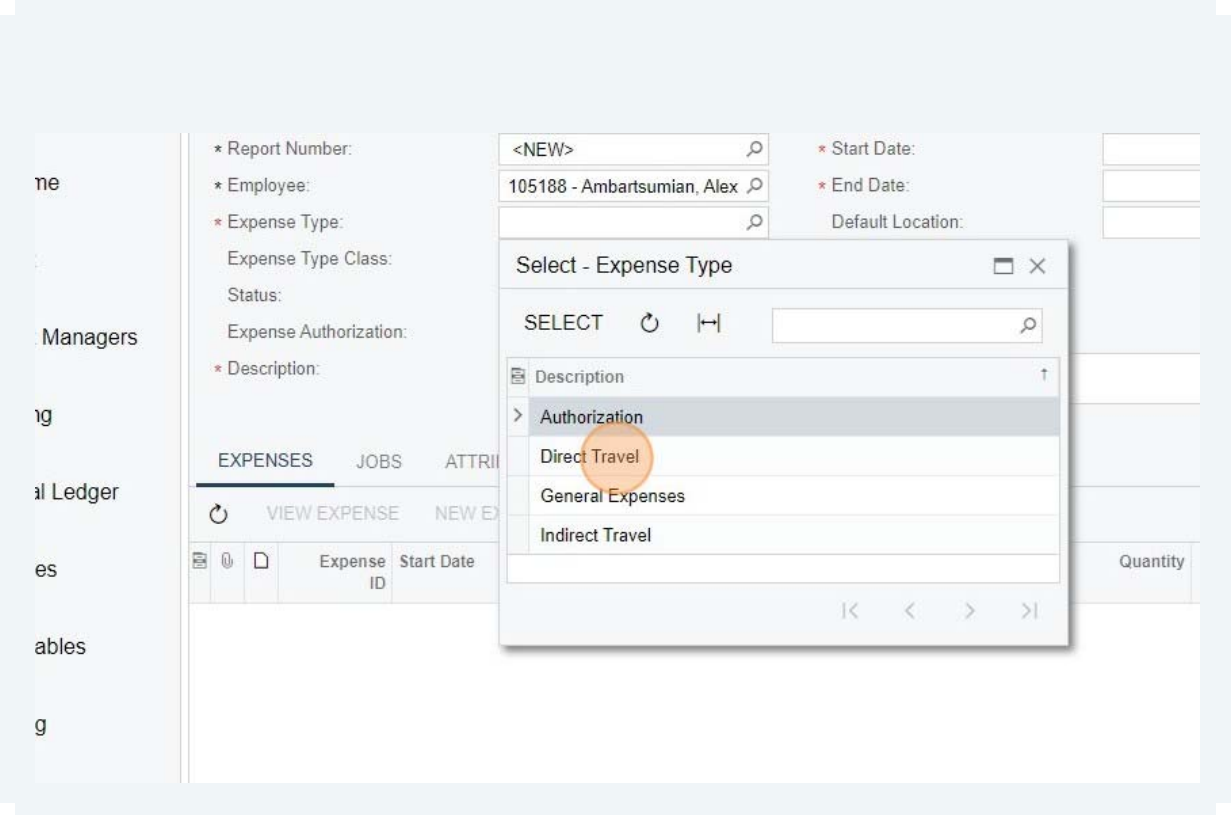


24. When all expenses are added ot the expense report, go up to the “Actions” drop down box and hit “submit.” Please note that expense reports cannot be submitted without a receipt or job code.

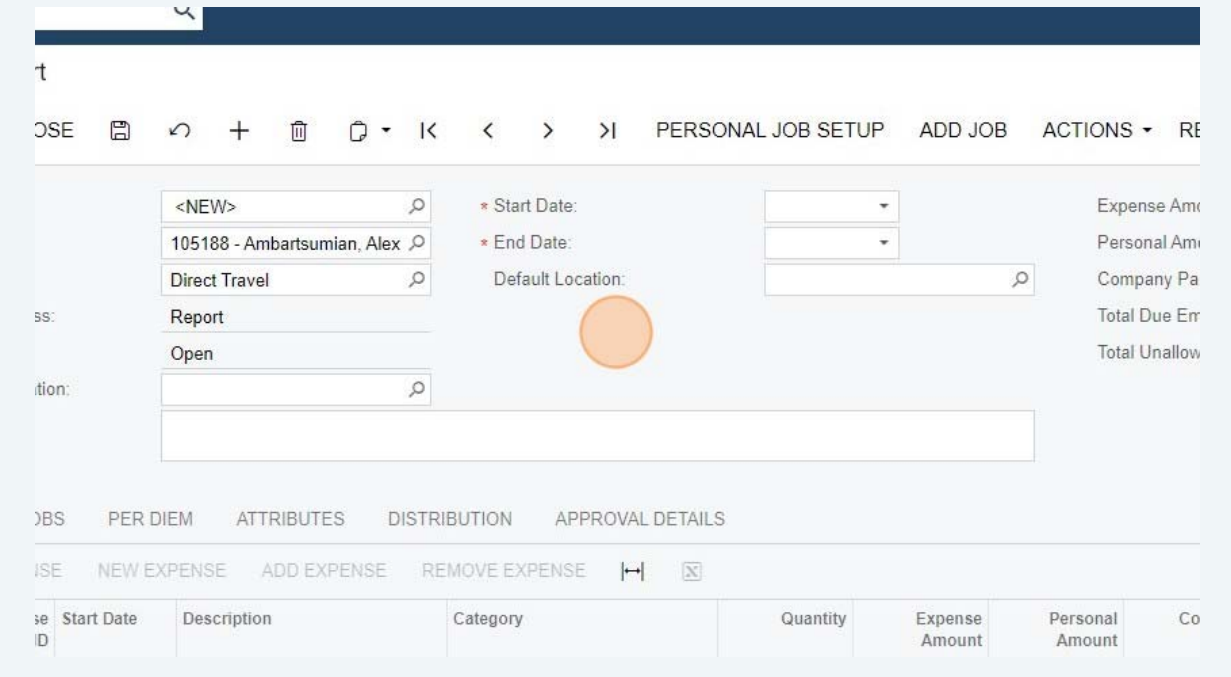


For Travel Expense Reports

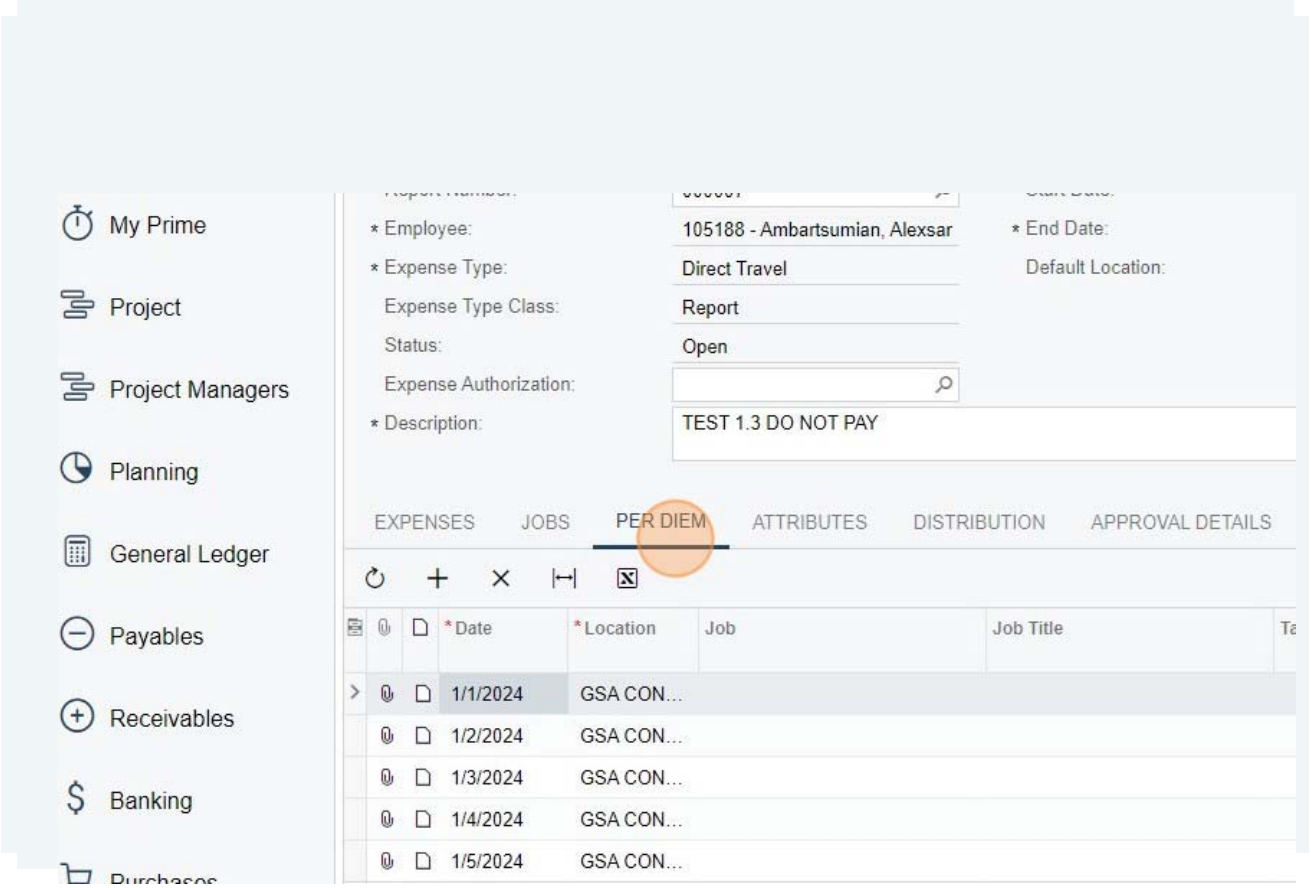
25. Please note, for travel, select “Direct Travel” under the expense type.



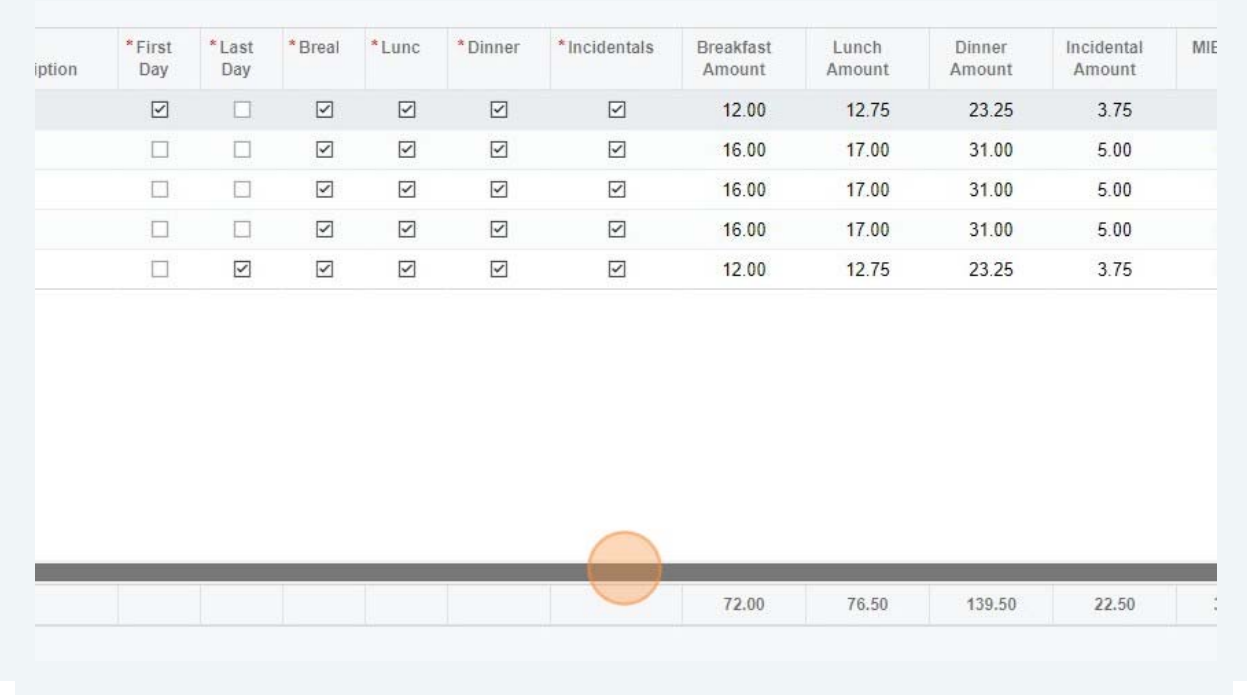
26. Please fill in all of the required fields, including the start and end dates, and the location of travel.



27. The per diem amount will be automatically populated under the per diem tab.



28. The user has the ability to uncheck any meals that are not being claimed.



iption	*First Day	*Last Day	*Breal	*Lunc	*Dinner	*Incidentals	Breakfast Amount	Lunch Amount	Dinner Amount	Incidental Amount	MIE
	☑	☐	☑	☑	☑	☑	12.00	12.75	23.25	3.75	
	☐	☐	☑	☑	☑	☑	16.00	17.00	31.00	5.00	
	☐	☐	☑	☑	☑	☑	16.00	17.00	31.00	5.00	
	☐	☐	☑	☑	☑	☑	16.00	17.00	31.00	5.00	
	☐	☑	☑	☑	☑	☑	12.00	12.75	23.25	3.75	
							72.00	76.50	139.50	22.50	