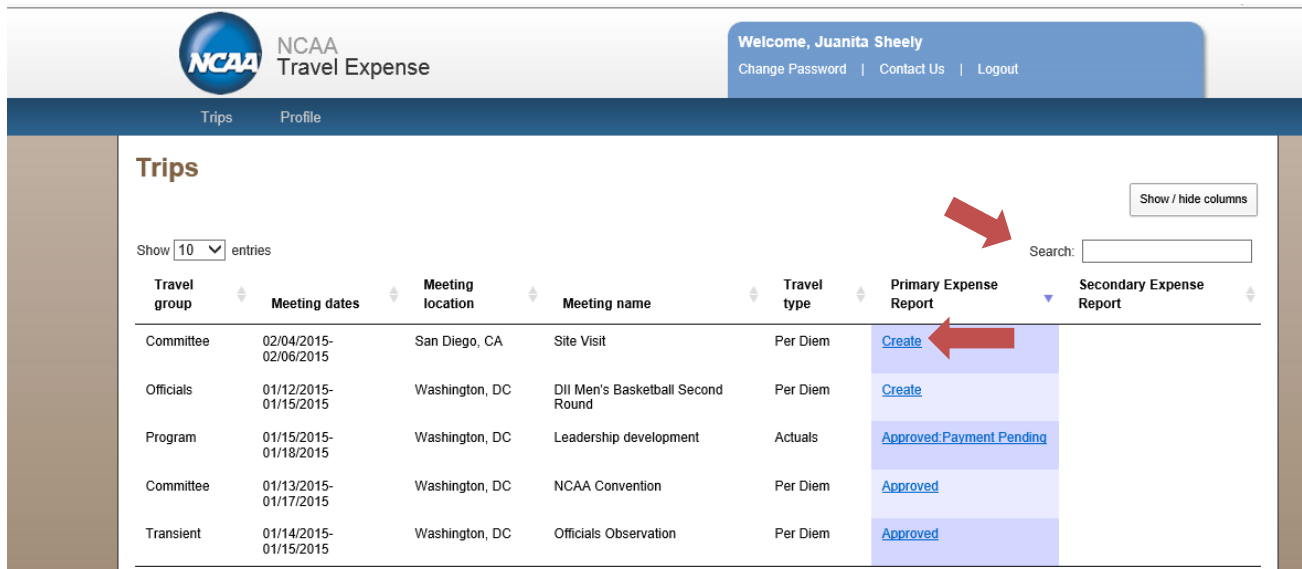# TRAVEL EXPENSE SYSTEM – TRAVELER USER GUIDE

1. On the last day of your meeting or trip, your staff liaison will authorize you to file an expense report. Once authorized, you will receive an email advising you to file your expense report and giving you the link to the system and login instructions.

2. The new system has been redesigned to offer the following conveniences:
   a. One username and password for all trips.
   b. View the status of all expense reports, as well as payment information, in one place.
   c. Simplify the system and improve usability.

3. Once you have received your email, follow the instructions to access the system and log in. On the home screen, you will see a list of all expense reports you are authorized for, as well as those already filed. Click on the column headers to sort the list as you prefer or use the Search box to locate a particular trip.

4. To begin a new expense report, click on the Create link.

5. First enter your travel dates. You can type the dates in or use the calendar icons to select them.

6. If you are eligible for per diem, your reimbursable amount will automatically populate based on your travel dates and the dates authorized by your staff liaison.

7. If you have other expenses to claim, click the Select to Add Expense drop-down menu, and choose the expense type from the drop down menu. Note, if per diem is paid, the NCAA does not reimburse items such as meals, parking, lodging, ground transportation, tolls, etc., except in extraordinary circumstances. Per diem travelers will most often claim mileage and baggage fees.

For each expense, enter the amount being claimed. If you are claiming an expense not ordinarily reimbursed, use the notes section to provide your reason for the request.

8. Some expenses will require you to submit receipts. When required, the Receipt field will be populated. To submit, simply click the Browse button and attach the appropriate file from your computer. The system can only accept pdf files.

9. Once all expenses are entered, choose who payment should be made to. You can choose yourself, or your institution, conference or business.

   To choose yourself, select Self from the drop-down menu. If the system does not have a record of paying you previously, you will need to add your address by clicking the Add Address button.

10. On the address screen, enter your Social Security Number and current mailing address in the fields provided. When complete, click Create Address change to be taken back to the expense entry screen.

Address Change

Social Security Number [ ]

Address Change

Address 1 [ ]
Address 2 [ ]
City [ ]
State [ ]
Postal code [ ]
Country code [ ]

Create Address change

If the system indicates you have been paid by the NCAA previously, the address we currently have on file for you will be shown. Please be sure that address is correct or enter any changes by clicking Modify Address.

Per Diem 4 day(s) * 75		300				
Mileage @ 0.53	400	212				Remove
Lodging		102.35	Browse...	No file selected.	stuck in connecting city overnigh	Remove

Add Expense Report Line

Pay To

Self

Mailing Address

	Current Address	Unapproved Update
Address 1		123 Main St
City		Anytown
State		IN
Postal code		46204
Country		USA

Modify Address

Please verify your mailing address. This is the address we will send all 1099 forms to, if applicable.

11. Finally, if the payment is being made to you, we will need your bank information in order to pay you by electronic funds transfer, or direct deposit. As with your address, if the system does not have your information on file, you will need to click Add Bank and complete the required fields. Once complete, click Update Bank Info.

State	IN
Postal code	46204
Country	USA

Modify Address

Please verify your mailing address. This is the address we will send all 1099 forms to, if applicable.

Payment Information

Bank is not configured

Add Bank

Please enter your bank information to receive funds via direct deposit.

Bank Info

Bank Info

Bank name	
Account type	Select Account Type ∨
Routing number	
Account number	

Update Bank Info

If the system indicates you have been paid by the NCAA previously, the bank information we currently have on file for you will be shown. Please be sure that information is correct or enter any changes by clicking Modify Bank.

Payment Information

|	Current Bank	Unapproved Update
Bank name	PNC	
Account type	Savings	
Routing number	071923456	
Account number	123852	

Modify Bank

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12. Once all expense, address and bank information is complete, click Submit to file your expense report. You will receive an email confirmation that the report was submitted. You can also follow the status on your home page.

13. If the expense report should be paid to your institution, business or conference, choose Organization from the drop-down menu. Then begin typing the name in the Select Organization field, and choose the correct one from the list. Payments made to an organization do not need to provide address or bank information.

14. Did you forget an expense? If you find you've forgotten to claim an expense after you have clicked submit, you can still request reimbursement. Simply log back into the system. Any report eligible to have a forgotten expense claimed, will have a Create link available in the Secondary Expense Report column. This option will only be available after the primary expense report has been approved and submitted for payment.

If the Secondary Expense Report option is not available, contact the travel department and an adjustment to the report can be made.
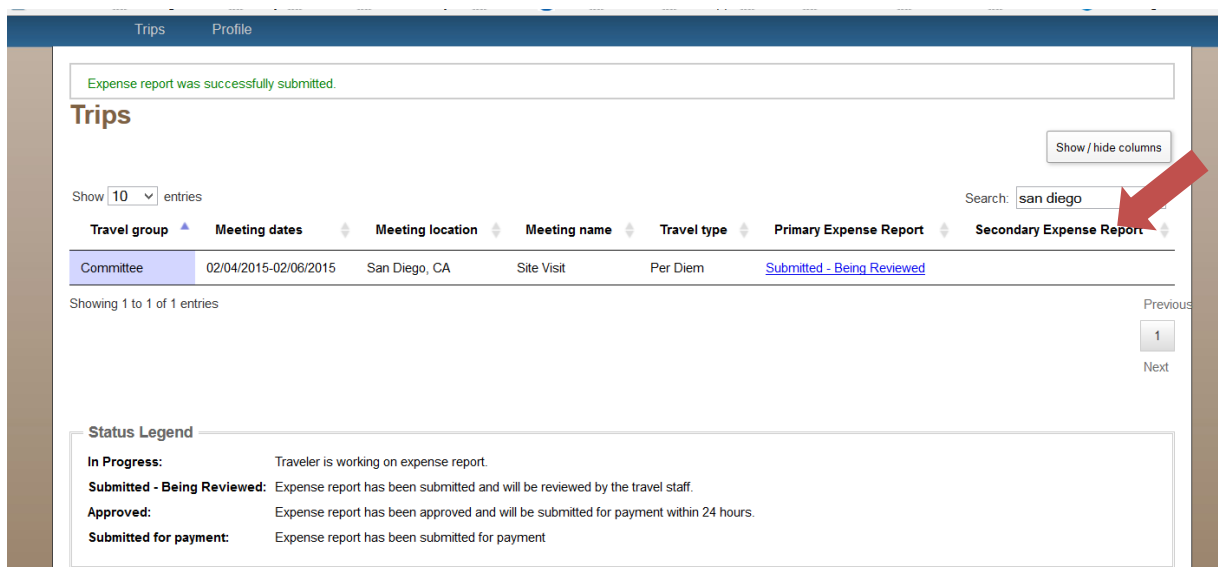
If you have trouble using the system, please contact the travel department at travel@ncaa.org or 317-917-6757.