VANDERBILT UNIVERSITY

Creating an Expense Report

October 17, 2025

Who can create an Expense Report?

- Faculty
- One Card Holders
- Staff
- Any student who has an active work relationship in Oracle
- For a student who is not employed, they will need to be “hired” in an expense only assignment.

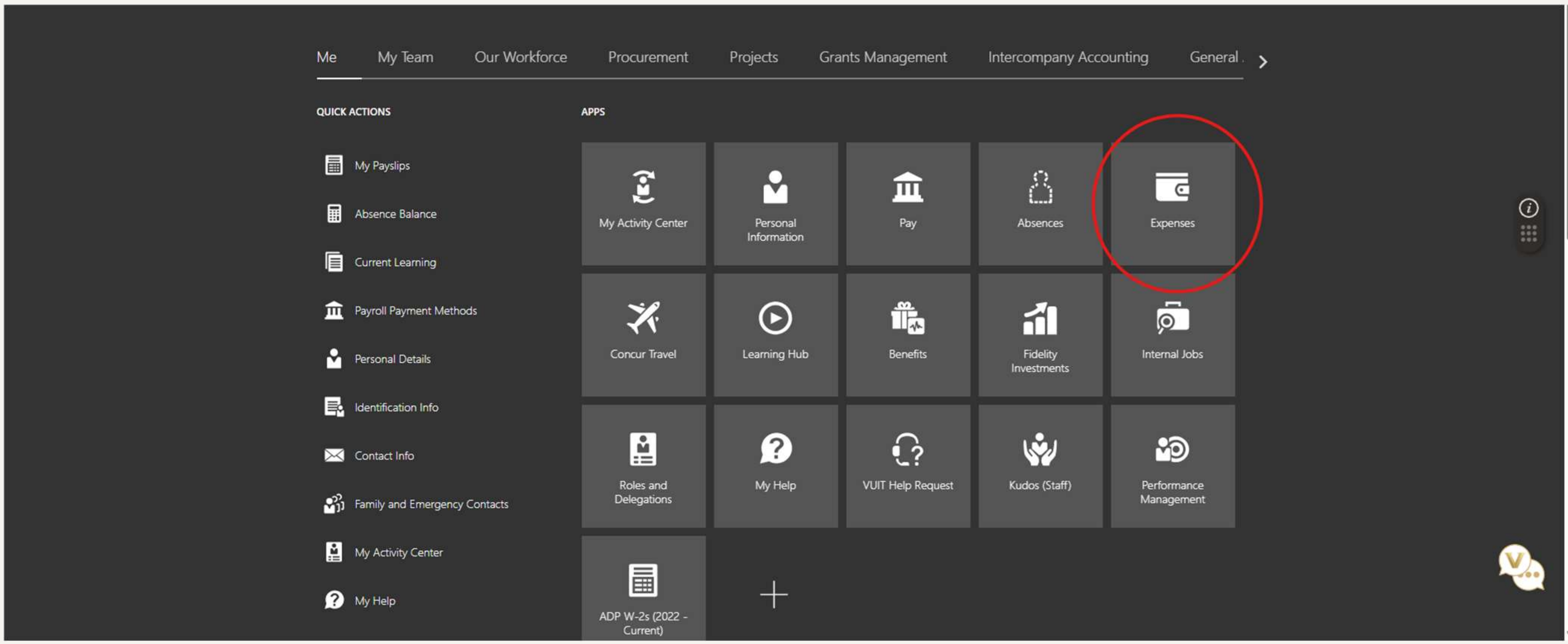
Policies to keep in mind

- Gift Card purchases, donations, contributions, and sponsorships are not allowed.
- Expenses older than 60 days are reported to Payroll as taxable income.
- Expenses older than 90 days will **not** be reimbursable.
- All flights **MUST** be booked through Concur or the expense may not be reimbursed. If lower rates for accommodation are available through a conference rate, the traveler may book through that website and attach the documentation in the expense report.
- Per Diem: When using sponsored funds (grant/contract) per diem is not an option. If not using sponsored funds, per diem is an option for all trips outside of Davidson County. You can expense each meal OR use per diem; you cannot use both.
- Mileage: Attach a screenshot from Google Maps showing the miles from start to finish.

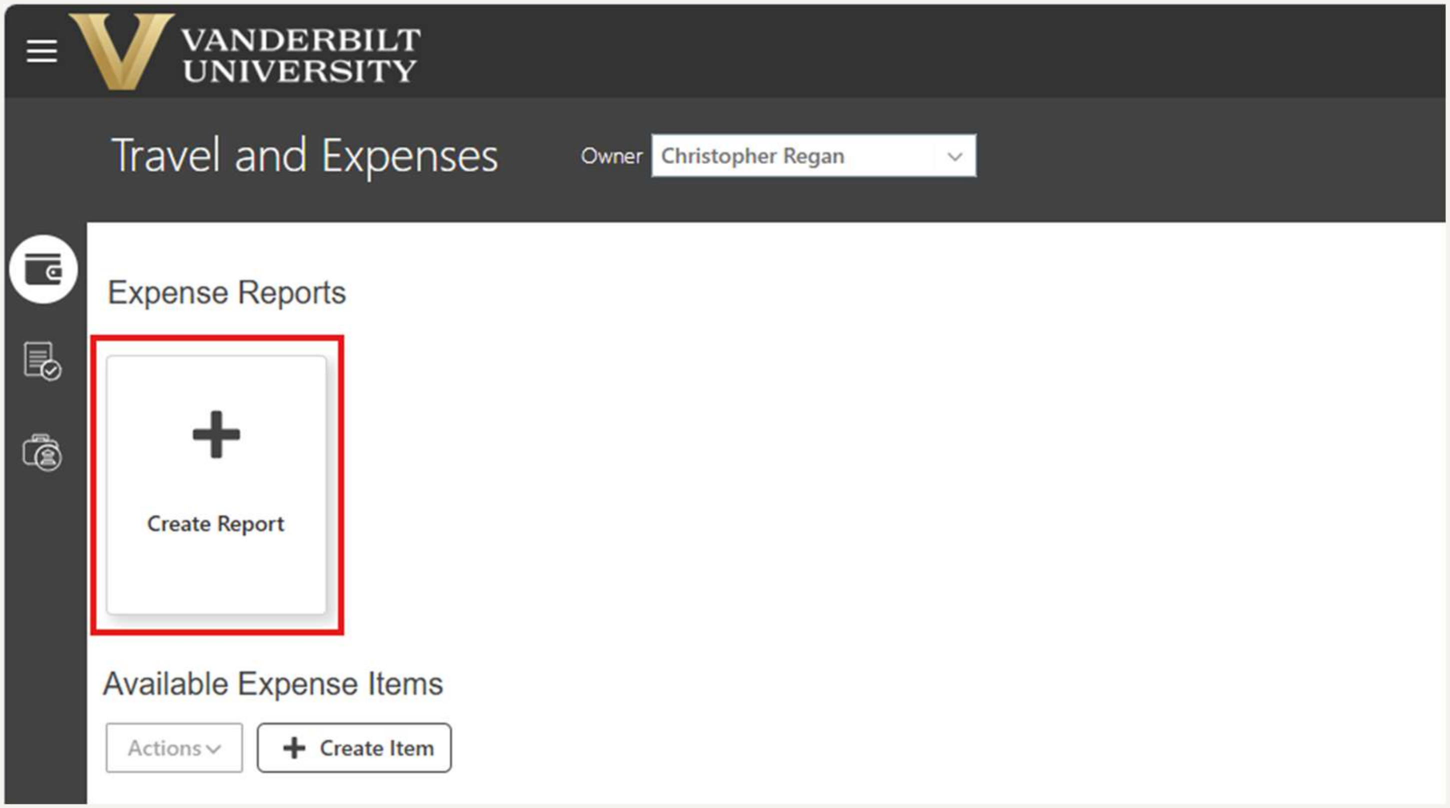
Driving vs Flying

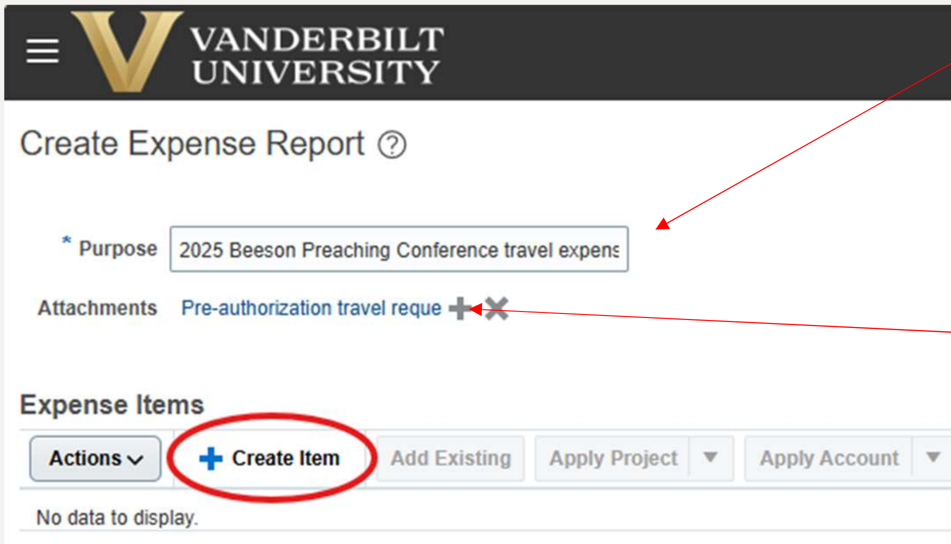
- The use of a traveler owned vehicle for Vanderbilt business purposes is reimbursable when it is the least expensive means of transportation.
- Vanderbilt reimburses travelers for the business use of their personal vehicle at the current IRS mileage rate for actual mileage incurred.
- For mileage exceeding **1,000 miles**, an airfare quote must be obtained **prior** to trip departure and attached within the expense report. Vanderbilt will reimburse for mileage up to the cost of the most economical airfare.

Click on the “Expenses” tab in Oracle



Click on the “Create Report”

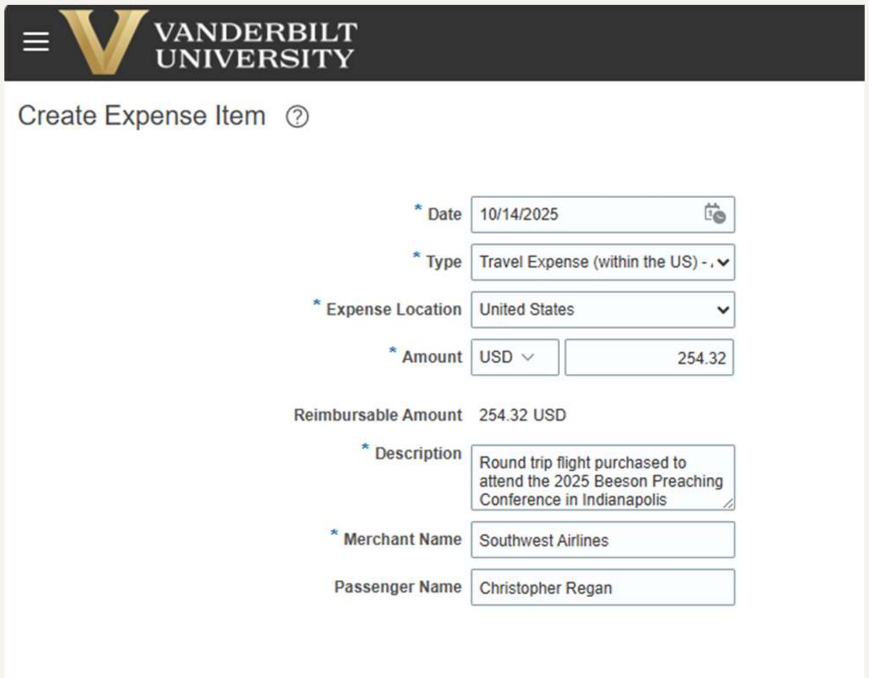




Purpose: This is where you will give your expense report a name. This should include the name of the event, dates, location and business reason. Please do not use acronyms for conferences/events.

Attachments: This is where you will attach any approval letters/emails.

After entering the purpose and uploading any attachments, you can begin adding each individual expense by clicking on “Create Item”


VANDERBILT UNIVERSITY

Create Expense Item

* Date: 10/14/2025
* Type: Travel Expense (within the US) - .
* Expense Location: United States
* Amount: USD 254.32

Reimbursable Amount: 254.32 USD

* Description: Round trip flight purchased to attend the 2025 Beeson Preaching Conference in Indianapolis
* Merchant Name: Southwest Airlines

Passenger Name: Christopher Regan

Date: Please use the date that your card was charged

Type: Choose the type that best categorizes your expense. If this expense was part of a business trip, please use the “Travel Expense” type.

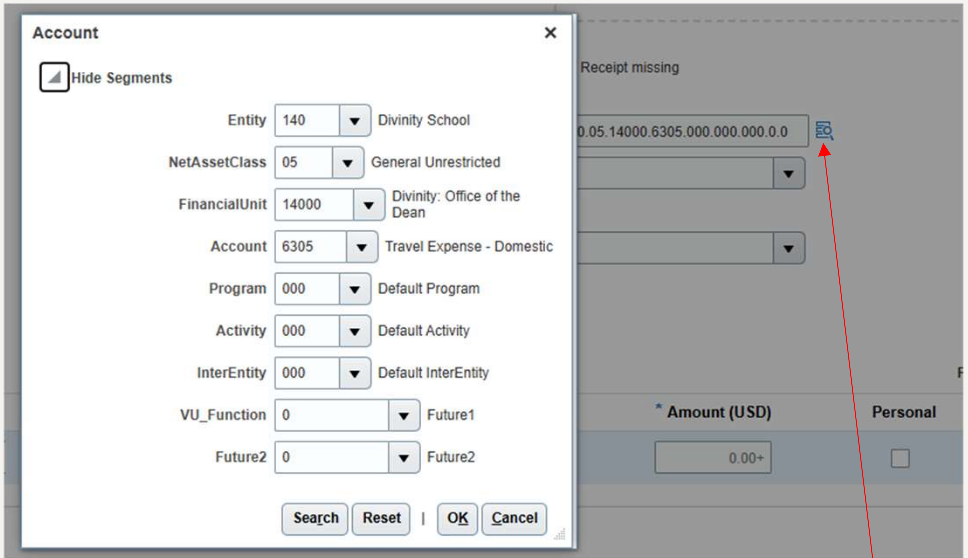
Amount: The amount that was charged to your card.

Description: Please include what was purchased in addition to the business purpose.

Merchant Name: The name of the vendor. When booking a flight through Concur, please enter the name of the airline.

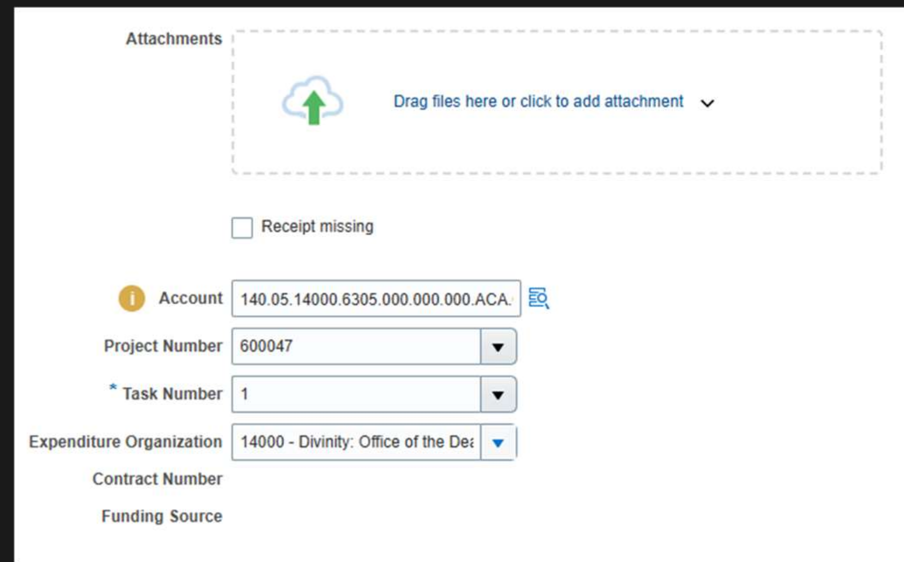
Passenger Name (optional): The name of the passenger on the concur receipt.

Using a COA as the funding source



You will need to enter the COA. Clicking on the blue magnifying glass will show all the segments of the COA which will make it easier to fill out. The Account number will auto populate when the expense type is selected. Do not change the account number.

Using a POET as the funding source

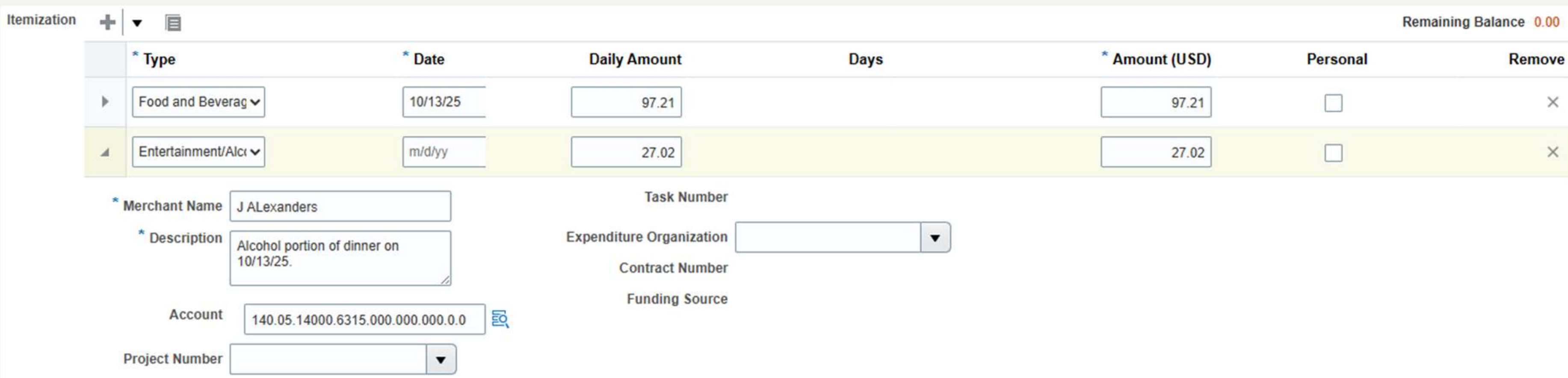


If you are using a POET, you can enter it in the "Project Number" field. Please be sure to enter the task number and the expenditure organization when using a POET. For example, 600047.14000.1. "600047" is the project #, "14000" is the Expenditure Organization and "1" is the task #.

Itemization

Itemization is only needed for 2 reasons:

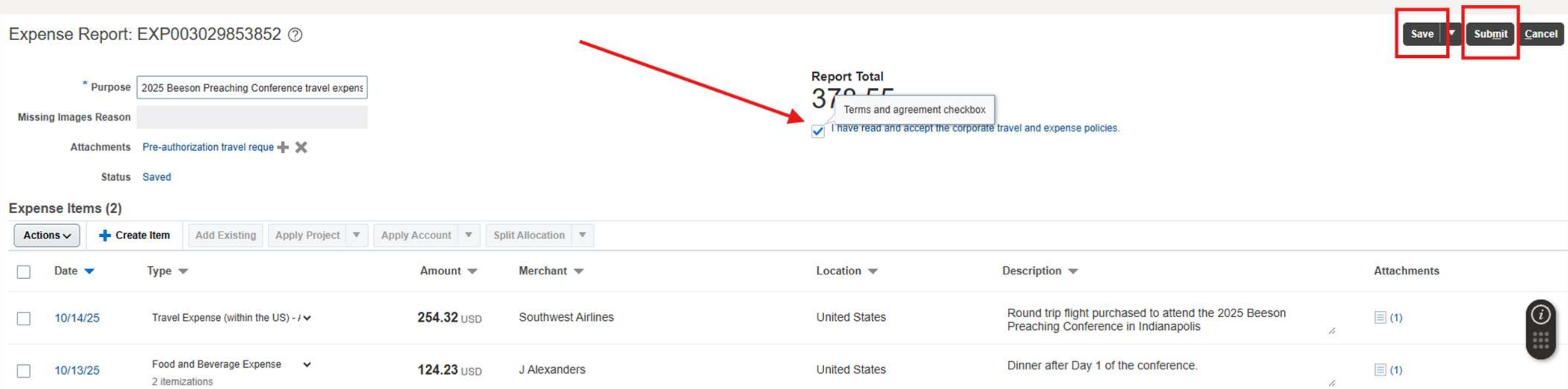
- Separating alcohol from a meal (the alcohol portion should be categorized as “Entertainment”).
- When using multiple funding sources for the same expense



Please use the Alcohol-Itemization-Template.xlsx to assist with itemizing alcohol from a larger purchase.

Submitting an expense report

- Once all expenses are added, please check to make sure everything has been entered correctly (name, amount, approvals/receipts are attached).
- After your review is complete, click on the "Terms and agreement" checkbox to acknowledge you have read and accepted the Travel and Business Expense Policy.pdf.
- Click on "Save", and then click "Submit" to submit your expense report.



Questions?

If you have any questions about the expense report process or the travel policy, please reach out to **Christopher.regan@vanderbilt.edu** for assistance.