

Submitting Meeting Expenses in Workday

General Notes:

- **IMPORTANT:** Be sure to add both of the following to one of the line items on the expense report:
 - The approval email from the Program Director (with a file name that includes “PD Approval”)
 - The conference program (with a file name that includes “program”).
- If you are going to exceed the maximum reimbursable amount for travel (\$2500 for domestic or \$2,000 for international), consider reducing the amount you put in for reimbursement under airfare or individual meals.
- All receipts must include the last 4 digits of your credit card.

This guide includes the following topics:

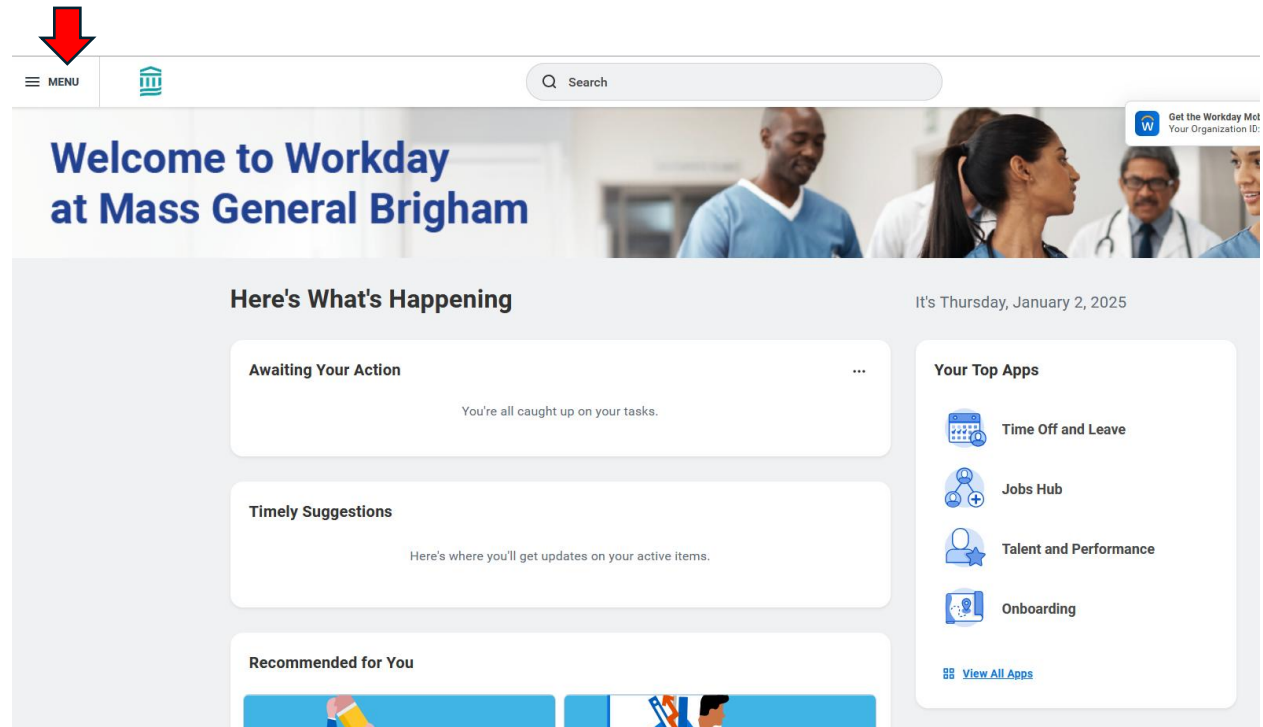
- First steps in creating an expense report for meeting expenses
- Adding an expense line for Airfare
- Adding an expense line for Hotel
- Adding an expense line for Registration
- Adding expense line(s) for Transportation (rideshare/taxi or rental car)
- Adding expense line(s) for Meals
- Complete the attestation process

First steps in creating an expense report for meeting expenses

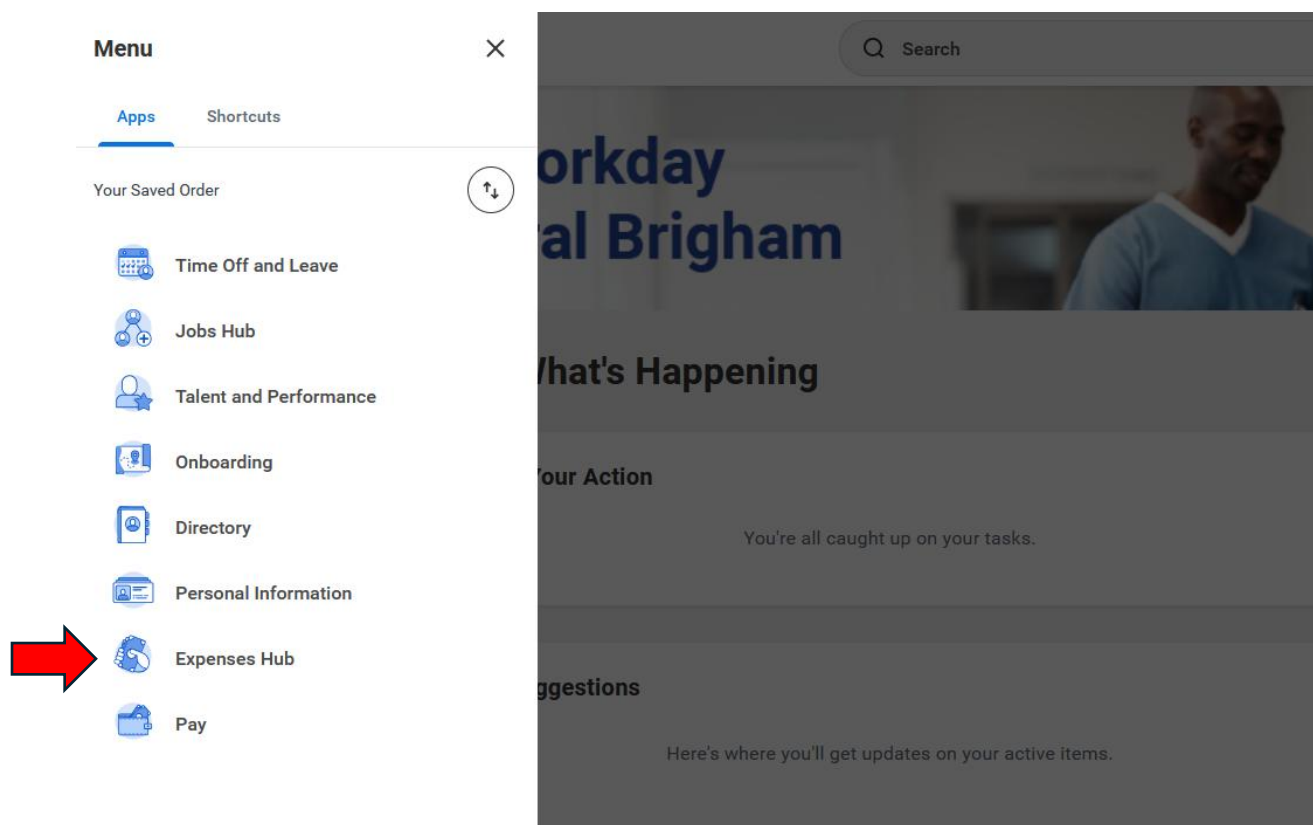
Workday link:

<https://www.myworkday.com/massgeneralbrigham/d/home.html>

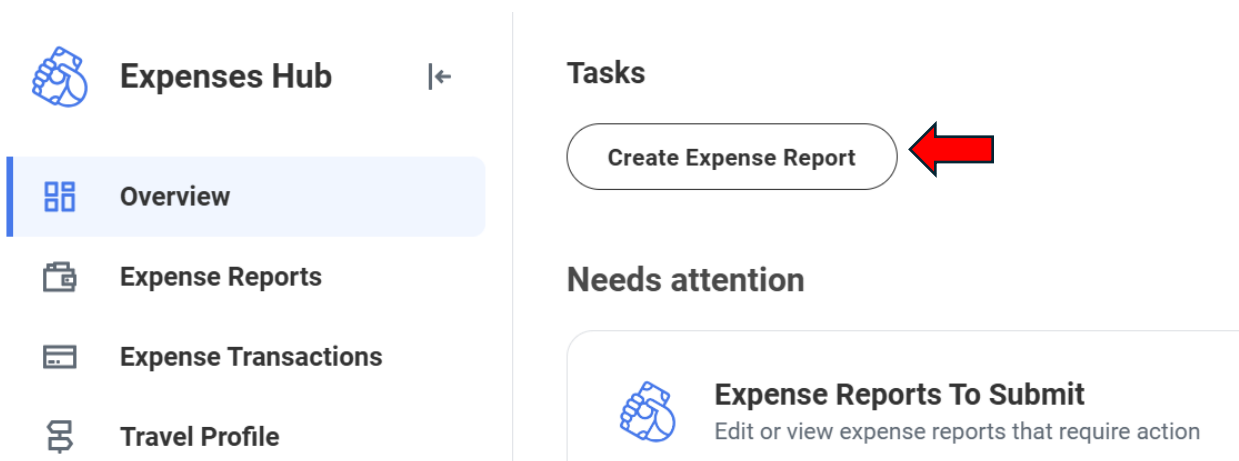
Click on MENU



1. Click on Expense Hub



2. Click on Create Expense Report



Create Expense Report

For Memo: Put your first initial and the first few letters of your last name followed by “Travel” and one of the following: (1x/residency) or (original research) or (PRIME/Research) or (SEA/HVO)

Company: 1300

Business Purpose: Off-Site Meeting

Cost Center: MGB091

Create Expense Report

▼ Expense Report Information

Expense Report For * Employee: Michael Zimmerman

Creation Options *

☒ Create New Expense Report

☐ Copy Previous Expense Report

☐ Create New Expense Report from Spend Authorization

Memo * J Smith Travel (1x/residency)

Company * 1300 Massachusetts
× General Physicians Organization, Inc.

Expense Report Date * 03/20/2025

Business Purpose × Off-Site Meeting

Cost Center * × MGB091 Anes - Education

Grant

Additional Worktags * × Fund: FC010 Unrestricted Operating

OK Cancel

Add an expense line for Airfare


Expense Date: Enter the date of the actual charge date for the reservation.

Expense Item: Search for and select **Airfare**.

Memo example (example): Roundtrip Airfare Boston – St. Louis

For item detail, you will need to provide: Destination, Ticket number

Expense Line

 Houston airfare.pdf
✓ Successfully Uploaded!

Comment

Expense Date *

Expense Item *

Total Amount *

Currency *

Memo

Company

*Cost Center

Grant

*Additional Worktags

Item Details

Airline

Destination *

Ticket Number *

Business Reason

Domestic Travel ☐

Foreign Travel ☐

Missing receipt justification

Itemization

Use the button below only if your company's expense policy requires itemizations.

Receipt Included ☒

After adding the necessary information for one trip, your options are:

- Click on **Add** to add another expense line, or at the bottom of the screen either
- Click on **Save for Later** (if you want to come back to add more lines). **TIP:** Save for Later as you go (after at least every 2-3 entries)
- Click on **Submit** when you have provided info for all your expenses (and to proceed with the submission)

Add an expense line for Hotel (as applicable)

General notes:


- Daily standard reimbursable rate for a single room is not to exceed **\$400/night** for room rate only and will not include taxes.
- In Boston, New York, Washington DC, Chicago, Los Angeles, and San Francisco the daily standard reimbursable rate for a single room is not to exceed **\$500/night** for room rate only and will not include taxes.
- The rental of private home or apartments (e.g., Air BnB or VRBO) is not allowed and will not be reimbursed.

Expense Date: Enter the date you were charged for hotel expenses.

Expense Item: Search for hotel and select **Hotel/Lodging**.

Memo (please include): Hotel room rate is not more than \$400 (or \$500 for cities listed above) before taxes

For item detail, you will need to provide: arrival date, departure date, destination (i.e, city of the meeting), number of days (*treat this as number of nights, and verify the number is correct*), daily rate (include taxes), business reason (conference or meeting attendance)



Houston hotel.pdf
✓ Successfully Uploaded!

Comment

Upload

Expense Date *

Expense Item *

Total Amount *

Currency *

Memo

*Cost Center (empty)

Grant (empty)

*Additional Worktags (empty)

Item Details

Hotel

Arrival Date *

Departure Date *

Destination *

Number of Days *

Daily Rate *

Business Reason *

Domestic Travel ☐

Foreign Travel ☐

Missing receipt justification

Itemization

Remaining Amount to Itemize 0.00/850.00 USD

Add

Daily Expenses

Edit

Room Tax (itemization only) *
Wed Mar 12 2025

Under Itemization, edit daily expenses to show:

- Room tax (include any fees here)
- Daily room rate.

When you are finished, the remaining amount to itemize should be \$0.00

Itemization

Remaining Amount to Itemize 850.00/850.00 USD

<div>Add</div>	0 items
Daily Expenses	
<div>Edit</div>	2 items
<hr/>	
Room Tax (itemization only) * Wed, Mar 12, 2025	0.00 USD
<hr/>	
Daily Room Rate (itemization only) * Wed, Mar 12, 2025	0.00 USD
<hr/>	

An example of the itemization of daily expenses follows.

Daily Expenses

Remaining

750.00/850.00 USD

Check in Date

* 03/12/2025

Expense Item

* Room Tax (itemization only)

Number of Nights

*

Daily Rate

*

Total Amount

*

Memo

Company

1300 Massachusetts

×

General Physicians Organization, Inc.

...

:

≡

*Cost Center

×

MGB091 Anes - Education

...

:

≡

Grant

:

≡

*Additional Worktags

×

Fund: FC010 Unrestricted Operating

...

:

≡

Personal Expense

☐

Remaining 0.00/850.00 USD

Check in Date * 03/12/2025

Expense Item * Daily Room Rate (itemization only)

Number of Nights *

Daily Rate *

Total Amount *

Memo

Company

1300 Massachusetts
× General Physicians
Organization, Inc. ... ⋮

*Cost Center

× MGB091 Anes - Education ... ⋮

Grant

*Additional Worktags

× Fund: FC010 Unrestricted
Operating ... ⋮

Personal Expense ☐

Click on **Done** when finished with itemization.







After adding the necessary information for hotel expenses, your options are:

- Click on **Add** to add another expense line, or at the bottom of the screen either
- Click on **Save for Later** (if you want to come back to add more lines). **TIP:** Save for Later as you go (after at least every 2-3 entries)
- Click on **Submit** when you have provided info for all your expenses (and to proceed with the submission)

Add an expense line for Registration

Expense Date: Enter the date you were charged for meeting/conference registration.

Expense item: search for Registration and select **Registration Fees**

Expense Date *	02/18/2025 
Expense Item *	<div>× Registration Fees </div>
Total Amount *	395.00
Currency *	<div>× USD </div>
Memo	<div></div>
Company	<div>1300 Massachusetts × General Physicians Organization, Inc. </div>
*Cost Center	<div>× MGB091 Anes - Education </div>
Grant	<div></div>
*Additional Worktags	<div>× Fund: FC010 Unrestricted Operating </div>

After adding the necessary information for one meal, your options are:

- Click on **Add** to add another expense line, or at the bottom of the screen either
- Click on **Save for Later** (if you want to come back to add more lines). **TIP:** Save for Later as you go (after at least every 2-3 entries)
- Click on **Submit** when you have provided info for all your expenses (and to proceed with the submission)

Add expense line(s) for Transportation (rideshare/taxi or rental car)

- Rideshare/taxi

For rideshare/taxi, enter a separate line for each trip.


Rideshare receipts must show start and end point for the rides.

Expense Date: Enter the date your trip

Expense Item: Enter **Transportation** and hit Enter on your keyboard (Transportation – Miscellaneous will appear)

Total Amount: Enter the amount on your receipt

Memo (example): Uber from airport to conference hotel

Expense Date	*	03/18/2025 
Expense Item	*	<div><div>× Transportation - Miscellaneous</div><div>⋮</div></div>
Quantity	*	<div>1</div>
Per Unit Amount	*	<div>23.50</div>
Total Amount	*	<div>23.50</div>
Currency	*	<div><div>Search</div><div>× USD</div><div>⋮</div></div>
Memo		<div>Uber from airport to hotel</div>
Company		<div><div>1300 Massachusetts</div><div>× General Physicians Organization, Inc.</div><div>⋮</div></div>
*Cost Center		<div><div>× MGB091 Anes - Education</div><div>⋮</div></div>
Grant		<div>⋮</div>
*Additional Worktags		<div><div>× Fund: FC010 Unrestricted Operating</div><div>⋮</div></div>

After adding the necessary information for one trip, your options are:

- Click on **Add** to add another expense line, or at the bottom of the screen either
- Click on **Save for Later** (if you want to come back to add more lines). **TIP:** Save for Later as you go (after at least every 2-3 entries)
- Click on **Submit** when you have provided info for all your expenses (and to proceed with the submission)

- Rental car

Note: Rental care will be reimbursed if reasonable and necessary to save time or money.

Expense Date: Enter the date you were charged for the rental car

Memo (example): rental car for 3 days

Total amount: Enter the total amount for the rental car

Expense Date	*	<input type="text" value="03/20/2025"/>
Expense Item	*	<input type="text" value="x Rental Car"/>
Quantity	*	<input type="text" value="1"/>
Per Unit Amount	*	<input type="text" value="376.22"/>
Total Amount	*	<input type="text" value="376.22"/>
Currency	*	<input type="text" value="x USD"/>
Memo		<input type="text"/>
Company		<input type="text" value="1300 Massachusetts"/> <input type="text" value="x General Physicians Organization, Inc."/>
*Cost Center		<input type="text" value="x MGB091 Anes - Education"/>
Grant		<input type="text"/>
*Additional Worktags		<input type="text" value="x Fund: FC010 Unrestricted Operating"/>

After adding the necessary information for one trip, your options are:

- Click on **Add** to add another expense line, or at the bottom of the screen either
- Click on **Save for Later** (if you want to come back to add more lines). **TIP:** Save for Later as you go (after at least every 2-3 entries)
- Click on **Submit** when you have provided info for all your expenses (and to proceed with the submission)

Add expense line(s) for Meals

General notes:


- Breakfast and/or Lunch – Combination not to exceed **\$40/person** per day
- Dinner- **\$135/person**.
- Threshold amounts noted in this section include food, beverage, and gratuity.

Expense item: Search for breakfast or lunch and select **Breakfast/Lunch** or search for dinner and select **Dinner**

Include a memo for each meal. Example: lunch on 3/14

For item detail, you will need to provide: Number of persons, business reason (example: lunch during conference)

Expense Line



lunch on 13-Mar.pdf
✓ Successfully Uploaded!

Comment

Upload

Expense Date *

Expense Item *

Total Amount *

Currency *

Memo

Company

*Cost Center

Grant

Item Details

Attendee(s)

Number of Persons *

Business Reason *

Unallowable ☐

Domestic Travel ☐

Foreign Travel ☐

Missing receipt justification

Itemization

Use the button below only if your company's expense policy requires itemizations.

Add

Receipt Included ☐

After adding the necessary information for one meal, your options are:

- Click on **Add** to add another expense line, or at the bottom of the screen either
- Click on **Save for Later** (if you want to come back to add more lines). **TIP:** Save for Later as you go (after at least every 2-3 entries)
- Click on **Submit** when you have provided info for all your expenses (and to proceed with the submission)

Complete the attestation process

Click on View Details

My Expense Reports

Create Expense Report

My Expense Reports 2 items

Expense Report	Actions	Report Date	Status	Memo	Amount	Reimbursement Amount	Worker Paid	Personal Amount	Currency	Company
ER00004716	Actions ▾	01/10/2025	In Progress		48.58	48.58		0.00	USD	1300 Massachusetts General Physicians Organization, Inc.

You have submitted

Up Next: [redacted] Attestation required

[View Details](#)

To Do

Click on To Do

Up Next

Michael Zimmerman

Attestation required

To Do

Details and Process

For

Expense Report: [ER00004716](#)

Overall Process

Expense Report: [ER00004716](#), Michael Zimmerman on 01/10/2025 for \$48.58

Overall Status

In Progress

Due Date

01/23/2025

Details

Process

Expense Report Number

ER00004716

Company

[1300 Massachusetts General Physicians Organization, Inc.](#)

Reimbursement

48.58

Personal

0.00

Done

48.58

Read the Instructions and click on Submit to complete attestation.

Complete To Do Attestation required

For

[Expense Report: ER00004716](#)

Overall Process

[Expense Report: ER00004716, Michael Zimmerman on 01/10/2025 for \\$48.58](#)

Overall Status

In Progress

Due Date

01/23/2025

Instructions

By clicking Submit, I certify that this report accurately describes the actual and necessary business expenses incurred in compliance with MGB policies unless specifically noted. I have not received reimbursement for these expenses from any other MGB entity or outside source.

If airfare expense has been charged to a federally funded grant, I further certify that best efforts were made to obtain the lowest reasonable commercial airfare for such travel. I further certify that no alcoholic beverages were included in any expenses charged to a federal grant.

Please see MGB Policy and Procedure for Employee Business Expense for more information regarding approvers and circumstances requiring Special Approval.

enter your comment

Submit

Save for Later

Close