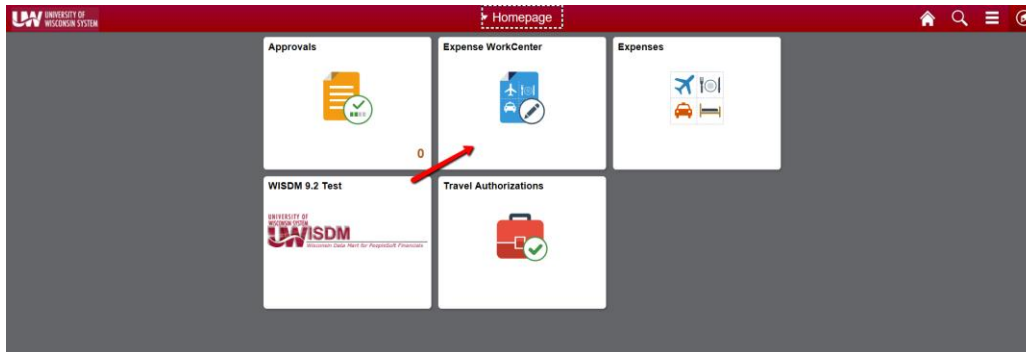
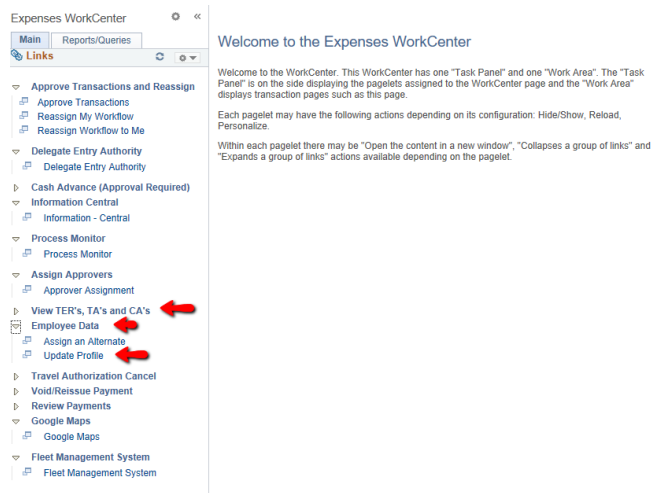


## How to Setup a Non-Employee Profile in e-Reimbursement

1. Click the **Expense WorkCenter** tile



2. Scroll down and expand **Employee Data**
3. Click the **Update Profile** menu.



4. Determine what the new non-employee ID number will be by changing the “Search By” drop-down box to Employee ID. Enter “NE” plus the individual’s initials (First Middle Last). If no middle initial is provided on the form, we use the letter “Z”. Click search. A list of all non-employee IDs that start with the five letters entered displays. Choose the next 3-digit number in the list, making a new 8-digit non-employee ID number. Write this number down.  
**\*\*NOTE: If the non-employee is actually an employee from another campus, please have them use the Custom Funding on the TER to charge to another campus.**  
**Example: In the example below, the next available non-employee ID would be NEMLS006.**

**Employee Profile (Edit)**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search by: Employee ID  begins with

**Search** [Advanced Search](#)

**Search Results**

View All First  1-5 of 5  Last

| Employee ID              | Name                                       | Last Name     |
|--------------------------|--|---------------|
| <a href="#">NEMLS001</a> | SHULER, MICHAEL                            | SHULER        |
| <a href="#">NEMLS002</a> | Click column heading to sort ascending ZIO |               |
| <a href="#">NEMLS003</a> | SCHROTH, MARK                              | SCHROTH       |
| <a href="#">NEMLS004</a> | SUCHOMEL, MEGHANN                          | SUCHOMEL      |
| <a href="#">NEMLS005</a> | SILVA-KRIEGER, MARTHA                      | SILVA-KRIEGER |

5. Click on the “Add a New Value” tab. Enter the new number you just wrote down. Click “Add.”
6. Complete the following fields.

Employee Data **Organizational Data** User Defaults Bank Accounts Corporate Card Information

Employee ID: NETEST

**Employee Information**

\*Last Name:  \*First Name:

Telephone:  Employee Base:  Home  Office

\*Personnel Status:  Payments Sent To:  Home Address  Mailing Address

**Home Address**

Country:  United States

Address 1:

Address 2:

Address 3:

City:

County:  Postal:

State:

**Mailing Address**

Country:  United States

Address 1:

Address 2:

Address 3:

City:

County:  Postal:

State:

7. Select the “Organizational Data” tab and complete the following:

- Employee Status: Always select “Active”
- Hire Date: Date of First Travel Expense (Indicated on setup form)
- GL Unit: UWXXX
- Department

***Note:** After entering the Department, hit “Enter.” This causes the GL Unit and Dept fields in the Default ChartField Values boxes to populate.*

- Fund/Program/Project
- Fill in either the Supervisor ID or Designated Approver. If you do not use HR Supervisor for approval of non-employee expense reports please put in T00000 as the Supervisor ID.

The screenshot shows the 'Expenses Processing Data' form with the 'Organizational Data' tab selected. The form contains the following sections:

- Valid for Expenses:** No
- Reason for Status:**
  - Default Profile
  - Ignore Authorized Amounts
- HR Information:**
  - Employee Status: [Dropdown menu with 'Active' selected]
  - Hire Date: [Date field] 0 (SFS)
  - \*GL Unit: [Text field]
  - \*Department: [Text field]
  - Hours Per Period:  Use Business Unit Default
- Supervisor Information:**
  - \*ID: [Text field]
  - Name: [Text field]
  - Designated Approver: [Text field]
- Default ChartField Values:**

| *GL Unit     | Fund         | Program      | Class        | Project      | Affiliate    | Dept         |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| [Text field] | [Text field] | [Text field] | [Text field] | [Text field] | [Text field] | [Text field] |
- Cash Advance Level:**
  - Business Unit
  - Specific Amount
  - None

Buttons at the bottom: Save, Notify, Add.

8. Select the “User Defaults” tab and complete the following:

- Payment Type: PER
- Billing Type: Determined by individual’s address (e.g. If the address is in the state of Wisconsin, select “In-State.”)

Employee Data | Organizational Data | **User Defaults** | Bank Accounts | Corporate Card Information

---

**Default Creation Method**

\*Expense Report: Open a Blank Report ▼  
 \*Time Report: Open a Blank Report ▼  
 \*Travel Authorization: Open a Blank Authorization ▼

**Expense Defaults**

|   |   |
|---|---|
| Report Description: <input type="text"/>    | Per Diem Range: <input type="text" value=""/>   |
| Business Purpose: <input type="text"/>      | Billing Type: <input type="text" value=""/>     |
| Originating Location: <input type="text"/>  | Payment Type: <input type="text" value=""/>     |
| Expense Location: <input type="text"/>      | Credit Card: <input type="text" value=""/>      |
| Transportation ID: <input type="text"/>     | Number of Nights: <input type="text" value=""/> |
| Accounting Detail Default View: Collapsed ▼ |   |

9. Skip the Bank Accounts and Corporate Card Information tabs (since these are non-employees, they are not eligible for Corporate Cards and will not have banking information since they are paid via check).
  - 10. Hit the Save button at the bottom.**
  11. Go to the Employee Data and then Assign an Alternate link in the Expense WorkCenter
  12. Enter the new non-employee ID number. Click “Search.”
  13. Enter the UW Person Emplid of the alternate (person that is going to submit the expense report on behalf of the non-employee), hit search and verify that the alternate’s name matches the form. If there is more than one alternate listed, click the “+” at the end of the row to create another line.
  14. Click “Save”.
- IF THE ALTERNATE NEEDS TO PUT IN THE EXPENSE REPORT TODAY DO THE FOLLOWING STEPS, ELSE THEY WILL AUTOMATICALLY HAPPEN OVERNIGHT AND YOU CAN SKIP THE REST OF THESE STEPS.**
15. Go to Update Profile link in the Expense WorkCenter.
  16. Find the new Non Employee Emplid you just created. Now there should be a Transportation Information tab at the top.
  17. Select the “Transportation Information” tab and complete the following:
  18. If your campus uses TurnDown Rate you may also need to add that row if this non-employee would need to claim that rate or the Motorcycle rate.

Employee Data | Organizational Data | User Defaults | Bank Accounts | Corporate Card Information | **Transportation Information**

**Test Test**

Transportation Identification Personalize | Find | First 1 of 1 Last

| *Transportation ID | Transportation Type | Short Description | Date Acquired | Status | *Status Date | Lease                    | Car Allowance            |
|--------------------|---------------------|-------------------|---------------|--------|--------------|--------------------------|--------------------------|
| STANDARD RATE      | STDRT               | STANDARD          | 01/01/2016    | Active | 01/01/2016   | <input type="checkbox"/> | <input type="checkbox"/> |

Transportation Type Setup

Distances Traveled Personalize | Find | View All | First 1-2 of 2 Last

| Transportation ID | Year | Distance Type | Total Distance |
|-------------------|------|---------------|----------------|
|                   | 0    |               | 0              |
| STANDARD RATE     | 0    | Miles         | 0              |

19. Click "Save."
20. Select the "Organizational Data" tab and click the "Validate" button. When the system finishes processing, you will be taken to the "Employee Data" tab.
21. Close the setup form document.