

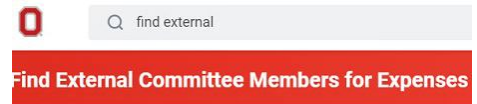
# Create an External Committee Member ECM/Guest – (Non-Employee) Reimbursement/Travel Reimbursement

*Reimbursements should be the last choice for purchases, with Non-employee reimbursements to be considered only after all other choices are weighed out.*

**NOTE: Reimbursement can only be made by check, no Electronic Fund Transfers. Must have phone number, full mailing address and email address of non-employee. Vendor Setup form not needed for this type of payment.**

*First check in Workday IF the non-employee may already be in the system. If they are in as a SUPPLIER, they will still need to be entered in as an ECM as they will not pull into the name field otherwise.*

In the Search field in Workday type in 'Find External Committee Members for Expenses'

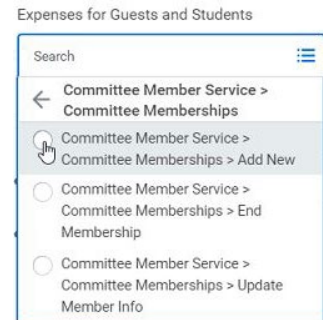


Enter the non-employee name (trying Jim/James, etc.) in the NAME field, click OK

If none are found, then type in Search field '[Create External Committee Member](#)'

Job Aid: [Create an External Committee Member](#)

- **DATE** -should be the period of time this person will be valid in Workday
- **COMMITTEE** -type in 'exp' (expenses), hit Enter
  - o Choose Guests and Students, OK
- **REASON** - select Committee Member Service > Committee Membership > ADD New
- Select Membership Type



**Proposed Membership Information**

Membership Type \*

- o Interview/Pre-Hires for Expenses
- o Non-worker Students for Expenses
- o Visitor/Guests for Expenses

- ADD '**Term End Date**' (must be set for at least one month, or up to one year from date of expense)

- Click **-Legal Name Information** TAB

- o FIRST NAME, LAST NAME



- Click **Contact Information** TAB

- **PHONE, ADDRESS, EMAIL** =choose **Primary Work** or **Primary home**

**Email**

Email Address \*   Home  Work

Type \*

Primary Work

Primary Home

- Add any comments... SUBMIT

*No wait time, once submitted the name will be automatically approved/available for the next step of reimbursement or creating a SA# for any travel reimbursements.*

## Create Spend Authorization for Non-Worker

TRAVEL REIMBURSEMENT - Must have a SA# in advance of the travel

Administrative Resource Center (ARC) Job Aid: SA - Create Spend Authorization

– Step 1 ▶ [Create Spend Authorization for Non-Worker](#)

In Search field type: **Create Spend Authorization for Non-Worker**

→ Payee Type auto fills as External Committee Member

→ For = name of person or group (Committee will auto fill), change date range, fill in Description, Business Purpose and Justification – then hit ADD under Spend Authorization Lines

Expense Item: Be sure to choose Travel Expenses

If split Worktags are needed, add duplicate Expense Items in the Spend Authorization request with the different Worktags.

The screenshot shows the 'Spend Authorization Lines' interface. At the top, there are tabs for 'Spend Authorization Lines' and 'Attachments'. Below the tabs is a '+ Add' button. The main area displays a single line item with the following details:

Expense Item	Quantity	Per Unit Amount	Total Amount	Memo
Mileage (Federal Rate)	50	0.56	28.00	ANR Educator Candidate Interview Travel F

REIMBURSEMENT

### Create Expense Report for Non-Worker (ECM/Guest)

Non-Travel or Travel-related expenses (for Travel- see SA# info in above section)

- In Search field type: **Create Expense Report for Non-Worker**
- Payee Type - choose: 'External Committee Member'
- Pay To- enter in External Committee Member name
- Choose 'Create New Expense Report from Spend Authorization'
- Complete rest of entry