Procurement: Travel & PCard Expenses
For all Employees

Purpose:
To create an expense report of expenses charged to Travel & PCard card.

How to Access:
Log into the Bear Trax application. Select the task in the Navigator.

Procedure:
Complete the following steps to report your travel card expenses:

1. Select the lines at the top left of the Bear Trax Page to view the Navigator Page. From the Navigator Page, direct yourself to the Expenses tab under Me.

Notice the expense items box shows 33 card charges (only 8 are showing on the screen capture). Below the list shows “new” expense items. On the right you can see two different card numbers one is a PCard charge and the others are Travel Card charges. This is the only place that will distinguish between the different transaction types. Click create report.
2. Fill in **Purpose**, Check the policies checkbox, and Click **Add Existing**.

3. Select the expense items. You can hit **Ctrl** and click to select more than one item. Then Click **Apply**.
4. Now you will see where the expense items have been added to the expense report.
5. Click on each expense item to finish the required fields.

6. Fill in the description, justification, if necessary correct the Type (several new “PCard” types have been added to the dropdown), attach your receipt and verify the correct account number is entered.

you must use a “PCard” type for all PCard transactions
**Note:** If you are missing a receipt, click the *receipt missing* box and you be required to enter a justification. Click *close*.

**Note:** If the yellow triangle warning shows then a procurement policy has been violated. This will not prevent you from proceeding but you may have to provide more information later when the expense report is audited.
7. Once all the expense items are filled out for the monthly expense report, click **Submit**.

8. Finally, you will get a message that your expense report has been submitted for approval. The approval process occurs in BearTrax and no paper copies or signature will be required.

Final Note: If you have expenses that are reimbursable (e.g. mileage, etc.) you will need to submit a separate expense report for those expenses.
Final Notes

By following these steps, you have successfully created an expense report for travel card expenses.