The Visitor’s Expense Report is primarily for reimbursing individuals who are not University faculty or staff, but who have incurred expenses for University-approved, business-related expenses, including transportation, lodging, and other travel or non-travel costs.

The department/school is responsible for:
- informing the visitor of the University’s expense reimbursement policies prior to his/her incurring of expenses
- providing the visitor with the Visitor’s Expense Report Form to document expenses
- collecting from the visitor the vendor information required for processing the reimbursement
- having all visitor forms properly completed and processed.

For further information about the Visitor’s Expense Report, go to:
http://www.northwestern.edu/finsys/ps/travel/planningexpensesreimbursements.html#Visitor

Navigation: The Visitor’s Expense Report is available on the NUPortal https://nuportal.northwestern.edu, under the Purchasing & Payments tab, under the Resource Forms heading at the bottom of the page.

Note: Each time you open this form, a unique identifying number is assigned to the Visitor’s Expense Report as the Request number. Mac users should be sure that a bar code appears. If not, call 1-HELP, ext. 2

Step 1: Complete Visitor’s Expense Report fields
A. The Dept Code is the 3-letter code identifying the department and should be entered in CAPS. This code will be included in the Visitor’s Expense Report identifying number automatically. For a listing of department codes: http://www.northwestern.edu/finsys/ps/forms/DeptCodeLookup.pdf.
B. Your contact information.
C. The Vendor Code for the visitor. If the vendor is not in NUFinancials, the vendor information must be added and then retrieved at NUFinancials→Vendors→Vendors Information→Review Vendors or the Cognos SC014 Vendor Info Query.
D. Visitor section is completed as applicable, including signature. Collect original receipts.
E. Enter chart string (don’t forget the Account field).
Step 2: Print form, obtain signatures, attach original documentation, the Expense Policy Exception Request (if applicable), and submit to ASRSP (for sponsored projects) or to Accounts Payable.

What Happens Next?

- Accounts Payable receives and enters the Visitor’s Expense Report into NUFinancials.
- The Requester receives an e-mail with a link to the Voucher Entry.

OR the Requester can find the Voucher Entry in the system:
NUFinancials→Accounts Payable→Vouchers→Add/Update→Regular Entry→Find Existing Value

- In the Voucher Entry page, there are tabs along the top to give all information related to the voucher, including payment information. The payment is mailed to the address on the Payments tab.
- The voucher number, not the Visitor’s Expense Report number, is used to track payment in the NUFinancials system.

Note: If you want to retain an electronic copy of the Visitor’s Expense Report, you can print and scan the completed form back into your computer, thus retaining the unique identifying number or you can set the Zoom feature at a percentage so as to capture the full form and select Ctrl+PrntScrn (or Ctrl+F14 for Mac) and paste in Word document.