

### Changes in your on-line entry procedures

- Business Purpose – STAR offers a lot more choices. The Court’s choices for the majority of travel should be:
  - o COURTS-Assignments
  - o Business Travel In-State or OutofState
  - o Confrnce/Convention-In-State or Out ofState
  - o Training/Education- In State or OutofState
  - o
- All of your travel entry now appears on just one page.
- The STAR system only differentiates meals as **In or Out-of-state** and **Overnight or No Overnight**. Therefore, you will need to add the meal type to your travel description along with your depart/return times and travel dates if overnight travel.  
For example: “Lunch, Assignment, 8am-4pm” or “Breakfast, Judicial Ed Seminar, 12/4/17 8am-2:00pm 12/6/17.”
- Car Mileage category choices are: **Mileage Car** (\$.51 rate currently) and **Mileage Car (TD)** (Dane County staff only, \$.352 rate currently).
- Receipts can be attached directly to the document via the Attachments link. You no longer need to email them to the Fiscal Office mailbox. See additional instructions in the Reference Guide.
- An employee can now withdraw their submitted expense report as long as the supervisor has not approved it. It will be returned to you in Pending status for future modification and submission. The **Modify** access is now at **Create/Modify**.
- The STAR system does not offer a Notes/Comments field when creating your expense report. Therefore, if you have specific instructions or special notes regarding your travel, please add to the Description field.
- The STAR system does not offer a Check Report for Errors button. However, the system will validate certain fields and will return a message regarding an error.

## Overview

The Wisconsin Court System uses the STAR Financial System, an online, web-based financial system managed by the State of Wisconsin, Dept of Administration. You must use STAR to request reimbursement of business-related travel expenses. You will be reimbursed for authorized travel expenses biweekly on your payroll check.

## Guidelines For Using On-Line System

The on-line system is designed to minimize the use of paper for requesting reimbursement for travel. After you enter your travel expenses in STAR, an email is sent to your supervisor notifying him/her that there is a travel expense transaction waiting for his/her review and approval. Once the supervisor applies his/her approval, the expense transaction is next routed to the court system's Fiscal Office for audit. The Fiscal Office reviews the expense transaction for compliance with the State's travel guidelines. The Fiscal Office will follow-up with you as needed and must apply final approval to the transaction before expenses will be reimbursed.

**To ensure prompt reimbursement of travel expenses, you should keep the following in mind:**

- Supervisors must promptly approve travel expense transactions to avoid delaying an employee's reimbursement.
- Expense transactions approved by the Fiscal Office **no later than Tuesday** following the end of each pay period will be reimbursed to employees on the next scheduled payroll.

## Logging On

The STAR Finance Travel Expense system is accessed through the following web address:

<https://travelexpense.wi.gov>

Login using your IAM USERID and password. This is the same ID and password you use to sign into the STAR Payroll system. Once you have signed in, you will be at the Travel, Expenses & P-Cards page.

## Navigating To A New Expense Report

To enter travel expenses into the system select the following from the menu:

**Travel, Expenses & P-Cards>Travel & Expenses>Expense Reports > Create/Modify**

To generate a new Expense Report (formerly referred to as a Travel Voucher) select **Create/Modify**. Your EMPLID should appear in the look-up box. Click on the **Add a New Value tab** and then **click Add**.

**NOTE:** Do not use your browser back button when navigating through the expense voucher.

## Creating A New Expense Report

To create a new expense report, perform the following steps at the **Expense Report Entry** screen:

- **Quick Start** – defaults to ...**Populate From**. Once you have created an expense report, you will be able to copy an existing report.
- **Header** section:
  - **Business Purpose:** From the drop down menu select the menu item that best fits the business travel:
    - COURTS-Assignments
    - Business Travel In-State or Out of State
    - Confrence/Convention-In-State or Out of State
    - Training/Education-In State or Out of State
  - **Description:** Enter month and year of expenses (e.g., Dec 17). To assist with efficient processing, you should record expenses by month of travel on separate expense reports
  - **Default Location:** DO NOT USE
  - **Reference:** DO NOT USE

- **Expenses** section: identify the expense that you are requesting be reimbursed. **All fields marked with \* require data entry:**

- **Expense Date:** Type or click on calendar to enter the date of the expense
- **Expense Type:** Select the most appropriate expense type from the drop down listing of possible state reimbursable expenses. You should select the most appropriate expense type from the drop down menu. Common expense types include, but are not limited to (\*\*=receipt required):
  - ✓ Meals In-State NoOvernight
  - ✓ Meals In-State Overnight
  - ✓ Meals Out-of-State NoOvernight
  - ✓ Meals Out-of-State Overnight
  - ✓ Mileage Car (@\$.51 rate)
  - ✓ Mileage Car (TD) (@\$.352 Dane Co only
  - ✓ Lodging In-WI (# of nights required)\*\*
  - ✓ Parking (receipt required > \$10)\*\*
  - ✓ Registration fees (receipt >\$25)\*\*
- **Description:** Enter more detailed information/business purpose of travel and the expense to be reimbursed (e.g. court assignment, Jud Ed seminar, DCA/Chief judges meeting, etc.). All meal claims require depart & return times and the meal type (breakfast, lunch or dinner). Overnight trips, require depart/return dates as well.
- **Payment Type:** Defaults to Payroll
- **Amount:** Enter the amount to be reimbursed (**NOTE:** if an expense type requires entry of mileage, you will not be required to enter anything in this field).
- **Billing Type:** Defaults to Billable

- **Location:** Destination city. Lookup or type city name. Mileage claims will require Originating Location and the # of miles.

Click on the + sign to add additional expense claims.

**Copying An Expense Line.** After you have entered at least one expense line, Click on the **Actions** dropdown listing at the top of the report. Select **Copy Expense Lines** and click on **GO**. Enter the new date(s) and select the Expense Type to copy. Click on **OK**. Copying is helpful when you have multiple expenses of the same type (**Note:** You will need to update any changes for each new expense).

**Deleting An Expense Line:** Click on the “-“ button at the end of the expense row. Click on **OK** to continue with the deletion.

**Save for Later.** Select this option if you have not finished entering all your expenses for submission. Saving your expense report will generate a **Report ID#**. To access a saved report at a later date, follow the navigation steps above for **Create/Modify**.

**Required Receipt Documentation.** The State’s travel guidelines require receipts for some expense types. A scanned copy of the required receipts can be attached directly to the expense report by clicking on the **Attachments** link. Click on **Add Attachment** and **Browse** to your scanned copy. Click on **Upload**. Repeat to add additional attachments or click **OK** to continue. You will see the number of attachments next to the hyperlink. To comply with IRS requirements, you must retain the original paper receipts in your office files for 6 years.

**Summary and Submit.** Click on this link when you have entered all expenses, have attached your required receipt and are now ready to submit to your supervisor for approval.

**Check the box** certifying your expenses are accurate and comply with expense policy. Click on **Submit Expense Report** and then on **OK**. Once your supervisor approves your expenses, they will next be routed to the Fiscal Office for final processing. You can monitor the process by navigating to **Main Menu > Employee Self Service > Travel and Expenses > Expense Reports > View**

**Withdraw Expense Report.** If you need to make an edit to a voucher previously submitted to your supervisor, but is still in **Submitted for Approval** status, you can click on **Withdraw Expense Report** and it will be returned to you in the **Pending** status. You can then modify the report as needed and re-submit.

#### **NOTES WHEN CLAIMING MILEAGE:**

- Enter round trip mileage for a trip with a single destination. For multiple destinations, enter mileage for each leg of the trip.
- If you are departing from home and your home city does not appear in the list, select Other, WI (WI000) as originating location. Enter home city name in the description box followed by purpose of the trip. Repeat for a return home.

#### **Questions**

If you have questions or problems logging onto STAR Finance, please contact Brian Lamprech, Fiscal Officer, at (608) 266-6865.

If you have questions about how to use STAR Finance for reporting travel expenses, please contact Peggy Andrew at (608) 266-3501 or email the Court’s system fiscal office at [fiscal.office@wicourts.gov](mailto:fiscal.office@wicourts.gov)

#### **Link to Travel Guidelines:**

<http://courtnet.wicourts.gov/travel/docs/travelguide.pdf>



## Director of State Courts

# *STAR Travel Expense Processing*

## Employee Quick Reference Guide

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Questions? Contact  
the Court System’s Fiscal Office  
at (608) 266-3501  
or at [fiscal.office@wicourts.gov](mailto:fiscal.office@wicourts.gov)