Job Aid: Itemizing an expense as a personal expense
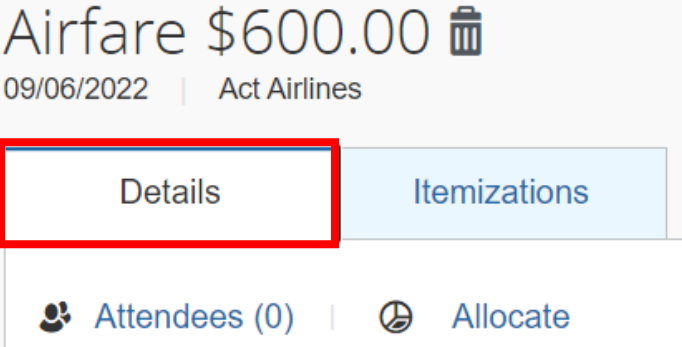
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How to itemize an expense as a personal expense

This aid will show you how to itemize an expense as a personal expense. Please note that not all expense types can be itemized. If you made a personal purchase on your UMD credit card and the expense type cannot be itemized, you will need to pay UMD back via check.

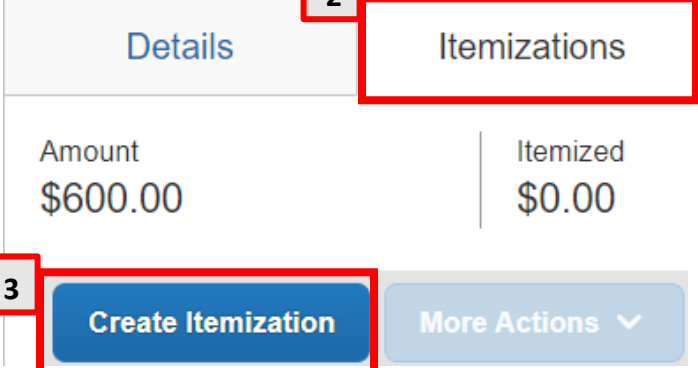*Screenshots are provided to use as visual guides for certain steps.*

Open the expense…

Airfare $600.00 🗑
09/06/2022 | Act Airlines

1. Complete the information under the **Details** tab

1 | Details | Itemizations

👥 Attendees (0) | 🌀 Allocate

2. Click on the **Itemizations** tab
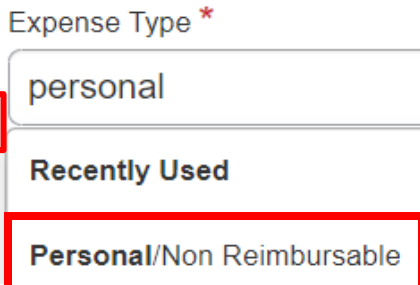
Details | 2 Itemizations

Amount
$600.00

Itemized
$0.00

3. Click on **Create Itemization**

3 Create Itemization | More Actions ⌄

New Itemization

4. Search for **Personal/Non Reimbursable**

Expense Type *

personal

4

Recently Used

Personal/Non Reimbursable

5. Fill in the **Amount** field with the portion of the expense that is a personal expense

6. If only a portion of the expense will be considered a personal expense, please make sure to itemize the remaining amount before saving the expense

Details	Itemizations

Amount	Itemized		Remaining
$600.00	$500.00	**5**	ⓘ $100.00

Create Itemization   **More Actions** ⌄

☐	Date ≜	Expense Type ↑↓	Requested ↑↓
☐	09/06/2022	Airfare	$500.00