

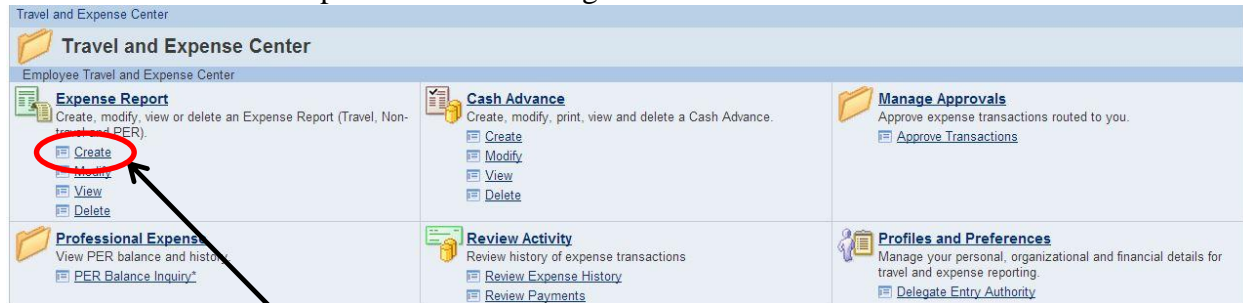
How to Create a Claim in PeopleSoft

Please be sure to see our [important tips](#) on completing your claim.

Sign in to PeopleSoft from our EAS Home Page



Select the Travel and Expense Center to navigate to this console



Click the **Create** link

Expense Report

Find an Existing Value | Add a New Value

Empl ID:



Your empl or studentID will Show up here

[Find an Existing Value](#) | [Add a New Value](#)

Create Expense Report Select a Template

Matthew Barnett

Report ID:

NEXT

Template Information			
	Template	Description	Template Type
Select	EXPENSES	Non-Travel Expenses	Public Template
Select	TRAVEL	Travel Expenses	Public Template

[Copy from Existing Expense Report](#)

Choose your template

Create Expense Report Add Expenses To Report

Matthew Barnett

Report ID:

NEXT

Template: TRAVEL Description: Travel Expenses

Expense Date

05/23/2013

← Dates can be changed later

Add Expense Types:

Select	Expense Type
<input type="checkbox"/>	Hospitality
<input type="checkbox"/>	Kilometers (#Kms)
<input type="checkbox"/>	Kilometers -Manual Calculation
<input type="checkbox"/>	Meals - Receipted
<input type="checkbox"/>	Parking/Visitor Permits
<input type="checkbox"/>	Per Diem - Canada \$45/day
<input type="checkbox"/>	Per Diem - Intl \$CDN 66/day
<input type="checkbox"/>	Per Diem - USA \$US 45/day
<input type="checkbox"/>	Pres&VPs Work Sessions/Mtgs
<input type="checkbox"/>	Registrations
<input type="checkbox"/>	Services General
<input type="checkbox"/>	Supplies General
<input type="checkbox"/>	Telephone/Internet
<input type="checkbox"/>	Vehicle Rental
<input type="checkbox"/>	Working Sessions/Meetings

OK Cancel

Choose your expense types
(Optional)
Click "OK"

Complete your claim with all pertinent details as seen in this example.

Be sure to have destination and dates for travel. If for non-travel expenses, type "Expense Reimb" and the date(s)

Be sure to indicate details such as the name of the conference, type of research activities, names of collaborators, purpose of travel or expense, etc.

Enter this first (If known and applicable)

Speed Code (Optional)

Enter a speed code! (Mandatory)

Enter a speed code here. Click "OK"

If the expense is to be split between multiple projects, use the "Add Chartfield Line" button.

The screenshot shows the 'Expense Report Entry' form for Matthew Barnett. The 'General Information' section includes:

- *Description: Saskatoon, SK May 21-23 2013
- *Business Purpose: Conference
- Project: G022000108
- Details: G022000108 - Gen Res-Chair, Earth Atmos Sci Sharp, Martin Supporting Details: Program facilitator for Emergency T&E Support Conference. Research activities regarding claim-induced mental and emotional trauma.
- Reference: 58194

 The 'Details' table below shows one expense line:

Select	SpeedCode	SpeedCode Description	*Expense Type	*Expense Date	*Amount Spent	*Currency	No GST	GST	*Description	Non Reimb	No Rcpt
<input type="checkbox"/>			Supplies General	05/23/2013	200.00	CAD	<input type="checkbox"/>	9.52	Walmart-Facial tissue, pens	<input type="checkbox"/>	<input type="checkbox"/>

 The 'Totals' section shows:

Employee Expenses:	200.00	Due Employee:	200.00
Non-Reimbursable Expenses:	0.00		
Cash Advances Applied:	0.00		

Enter a speed code here. Click "OK"

If the expense is to be split between multiple projects, use the "Add Chartfield Line" button.

The screenshot shows the 'Accounting Detail' form with the following data:

Speedcode	Description	Amount	*GL Unit	Monetary Amount	Account	Fund	Dept	Program	Class
		200.00	UOFAB	200.00	502101		360410		

 Below the table are buttons for 'Add ChartField Line', 'Refresh', and 'OK'.

Create Expense Report Expense Report Entry

Matthew Barnett

Report ID: NEXT

General Information

*Description: Saskatoon, SK May 21-23 2013
*Business Purpose: Conference
Project: G022000108
Details: G022000108 - Gen Res-Chair, Earth Atmos Sci Sharp, Martin
Supporting Details: Program facilitator for Emergency T&E Support Conference. Research activities regarding claim-induced mental and e
Reference: 58194

Click if you had a Travel Advance.
See [here](#) for further details.

Accounting Defaults **Apply Cash Advance(s)**

Details

Select	SpeedCode	SpeedCode Description	*Expense Type	*Expense Date	*Amount Spent	*Currency	No GST	GST	*Description	Non Reimb	No Rcpt
<input type="checkbox"/>	58194	Gen Res - Chr Earth Atmos Sci	Supplies General	05/23/2013	200.00	CAD	<input type="checkbox"/>	9.52	Walmart-Facial tissue, pens	<input type="checkbox"/>	<input type="checkbox"/>

Copy Selected Delete Selected Check For Errors New Expense Add

Totals	
Employee Expenses:	200.00
Non-Reimbursable Expenses:	0.00
Cash Advances Applied:	0.00
Due Employee:	200.00

Definition of Totals Update Totals

Save Submit Print Detailed Report

Review the claim for completeness and then click 'Save'

Create Expense Report
Expense Report Entry

Matthew Barnett

Report ID: 000304821

Notice that a Report ID# appears

General Information

*Description: Saskatoon, SK May 21-23 2013
 *Business Purpose: Conference
 Project: G022000108
 Details: G022000108 - Gen Res-Chair,Earth Atmos Sci Sharp, Martin
 Supporting Details: Program facilitator for Emergency T&E Support Conference. Research activities regarding claim-induced mental and emotional trauma.
 Reference: 58194

Accounting Defaults Apply Cash Advance(s)

Details

Select	SpeedCode	SpeedCode Description	*Expense Type	*Expense Date	*Amount Spent	*Currency	No GST	GST	Description	Non Reimb	No Rcpt
<input type="checkbox"/>	58194	Gen Res - Chr Earth Atmos Sci	Supplies General	05/23/2013	200.00	CAD	<input type="checkbox"/>	9.52	Walmart-Facial tissue, pens	<input type="checkbox"/>	<input type="checkbox"/>

First - Print the Report

Copy Selected Delete Selected New Expense Add

Totals

Employee Expenses:	200.00	Due Employee:	200.00
Non-Reimbursable Expenses:	0.00		
Cash Advances Applied:	0.00		

Definition of Totals Update Totals

Print Detailed Report

Save Submit

Then "Submit"

Approval of this report confirms that the above information is an accurate record of expenses incurred by the claimant and the appropriate supporting documentation is provided. For research project/trust accounts, these expenditures are in support of the research project and in compliance with the sponsor guidelines and donor terms.

OK Cancel

YOU MUST CLICK "OK" TO COMPLETE THE PROCESS!!!

***Return your printed Detailed Report and all original receipts to the EAS Office for processing.**