1. Go to https://finance.uwo.ca/psp/fsprdweb/?cmd=login&languageCd=ENG

2. Login using the credentials you use to access Western email.

3. Click on Employee Self-Service (top option in list on left) > Travel and Expense Claim Centre > Expense Report > Create  **Don’t click on “Travel and Expenses” further down the list on the left – use above path.

4. Ensure you are on the “Add a New Value” tab at the top (should default to this). Your name and ID will show. Click “Add.”

You are now in the claim form where you enter your details. Note that any field marked with an asterisk ‘*’ is mandatory. Expenses claimed must adhere to university policies: http://uwo.ca/finance/accounting/travel_expense_reimbursement.html

You can save your information and go back into the form at a later time if necessary: Employee Self-Service (top option in list on left) > Travel and Expense Claim Centre > Expense Report > Modify. This is how to retrieve your claim if you are asked to make changes after submission.

5. Enter a description to identify the purpose of the claim. For example, Conference, Research Symposium. Add the name of the conference if it fits.

6. Select “Business Purpose” from the drop-down box. Options include Conference, Department Expense, Donor Cultivation, Meeting, Meeting – Professional Group, Recruitment – Faculty/Staff, Recruitment – Students, Research, Subject Fees, Team Recruitment, Team competitions, Training. Many of these are not applicable; you will likely use Conference or Research. If unsure what to use, please ask.

7. Default location is either Canada or outside of Canada.

8. Use the Comment section to note details not input elsewhere. For example, name of conference and dates, specific location or any special notes with regards to the receipts you are submitting.

9. Nothing is required for “Reference” so can be left blank, unless you have been directed otherwise or wish to indicate something to differentiate this specific report.

10. Travel End Date – date on receipt, or last date (most recent) in a series of receipts.

11. Click on the blue link “Accounting Defaults.” Entering this information at the beginning before entering any expenses means it will default for every expense item entered. You can also enter this in relation to each expense item entered, and may have to do so if different things are being claimed to different Speedcodes.
There are 7 categories: %   *GL Unit    Speed Code    Fund    Dept    Program    Project

The % defaults to 100 and should be left alone unless you are splitting all expense(s) between two or more accounts.

**GL Unit** defaults to UWO.

Enter the **Speedcode** for the correct research grant (combination of 4 letters and/or numbers). This is the account from which you will be reimbursed.

**Fund** will default and so will **Program**.

**Dept** will also default.

**Project** can be left blank.

12. Click OK to return to the main form.

13. Enter your expenses. Each expense must be listed individually unless there are items that appear on the same receipt and they are the same type of expense (e.g. supplies). Please note that there are no “per diem” amounts for food, but guidelines are set for maximum amounts for breakfast, lunch and dinner and you must have receipts: [http://www.uwo.ca/finance/travel/](http://www.uwo.ca/finance/travel/). If you purchase groceries in lieu of meals, enter this under “all day receipts” and indicate the date(s) for which your receipt applies. Please note that you will not be reimbursed for alcohol unless you receive prior permission for this expense. If your expenses are in a currency other than Canadian, choose the correct currency and the program will compute the exchange for you.

14. You cannot claim more than the amount of your travel award; expense claims that exceed this amount will be returned. For example, if you were awarded $1000 and you have an airline ticket for $1100, only claim $1000 – not the full $1100.

Expense Type options:

- Accommodation – hotel
- Accommodation – other’s home allowance
- Airfare – Can-Intnl (not US)
- Airfare – Canada – Canada/US
- Airfare – non-Canadian departure
- Long Term Accommodation Rental
- Meal – Breakfast (TB Rate)
- Meal – Dinner (TB Rate)
- Meal – Lunch (TB Rate)
- Meal – All Day Receipts (TB Rate)
- Meal – Hospitality Receipt
- Misc – Equipment
- Misc – Memberships
- Misc – moving
- Misc – Reception/entertainment
Misc – Registration Fee
Misc – Subject Fees
Misc – Supplies
Transport – Other
Transport – Rail
Transport – Auto – rental
Transport – Auto – km allowance
Transport – Auto – km other

For each expense that you enter, enter the date, amount and currency. Then click on the “detail” link. Another window will open. Complete the mandatory fields. The “Description” box can be used to clarify as needed/applicable. You can click on the “Check Expense Report for Errors” at this point, or click to “Return to Expense Report” (the main form).

If you need additional rows to enter expenses, click on the ‘+’ at the end of the last expense row entered.

15. Once you have entered all expenses, click on the “Check for errors” bar.

16. Make any corrections as applicable, and click the “finish and submit” button.

17. Once you have submitted, there is an icon at the bottom, right hand side of the page of the screen for “printable view.” Click this and print out your expense claim as one copy must be submitted with your receipt(s). You may also wish to print a copy for your records.

Submitting your claim begins the approval process. Please take your *receipts and a signed copy of your expense claim form to Elsie Chan in the Dean’s Office.

*Please include itemized receipts where applicable. Email receipts (e.g. conference registration), must demonstrate that payment was received (itineraries or invoices that do not show proof of payment are not acceptable).

The funds will be electronically deposited to the account information on file.

Please be sure to follow up with your report (item 10, Conference Travel Guidelines) and include proof of attendance (i.e. the schedule showing your presentation).

Have questions or need help?

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