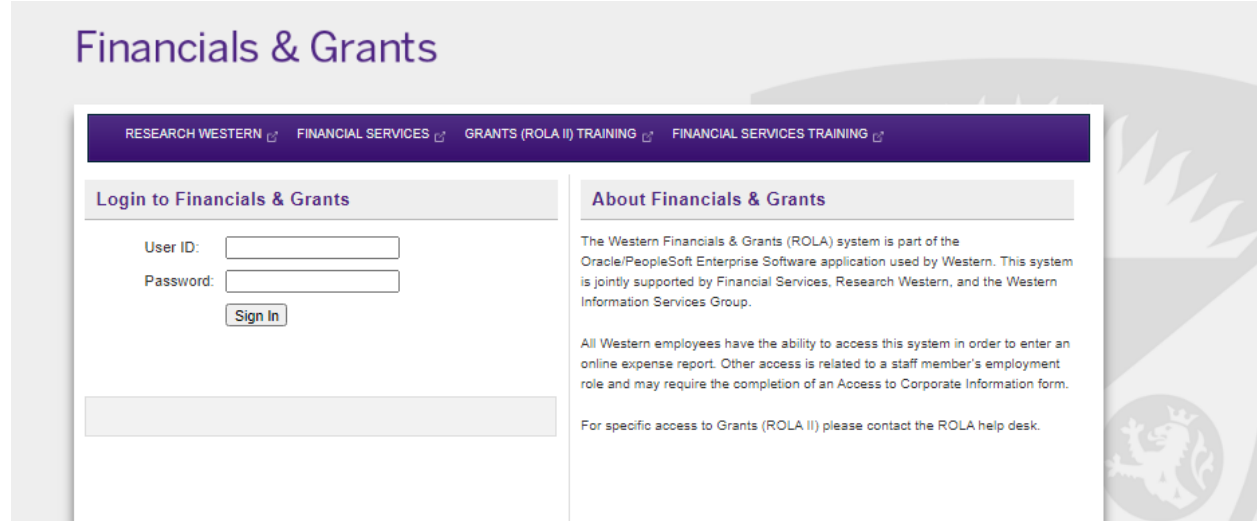# Resident Online Expense Claims

For the example below, I will use the UpToDate subscription as an example. At the end of this document I will provide a list or required support for different types of expenses. Providing these will reduce the amount of follow up.
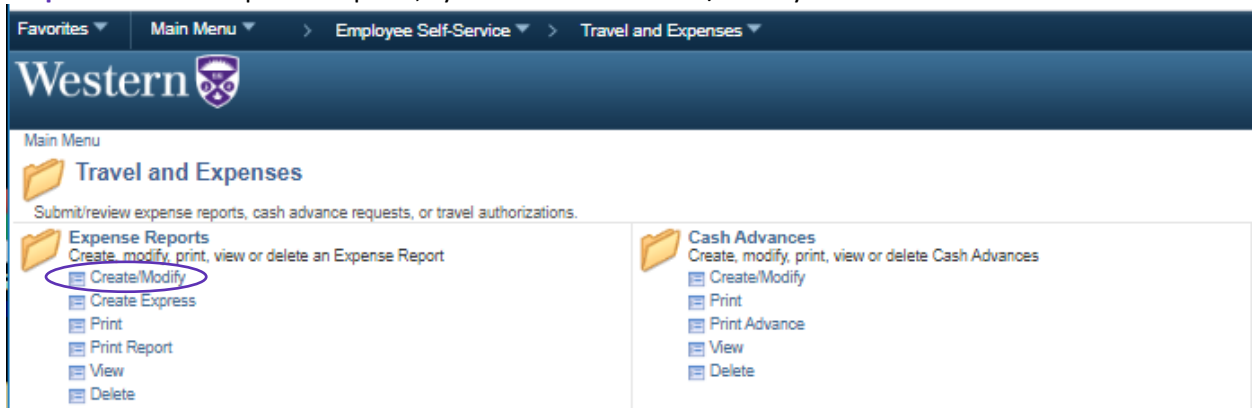
Step #1 - Go to **finance.uwo.ca** and login using your Western username and password


Step #2 – On the home page, under "Employee Self-Service," you want to select "Travel and Expense." Note: Your home page will not have as many options as the picture below, but that is okay.
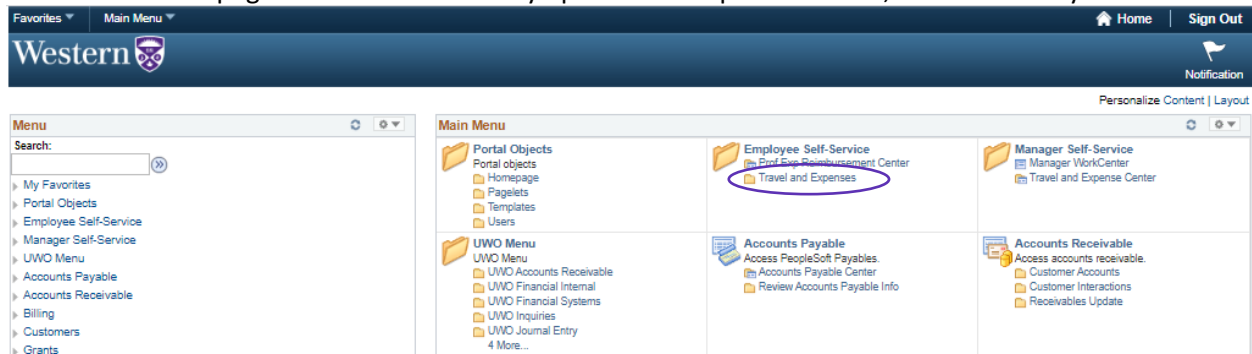
Step #3 – Under "Expense Reports," you will select "Create/Modify."

Step #4 – In the next screen, you can select "Add" down below if you are creating a new expense claim. If you are continuing to work on one, you would select the tab that says "Find an Existing Value" which would list your claims that you've started.
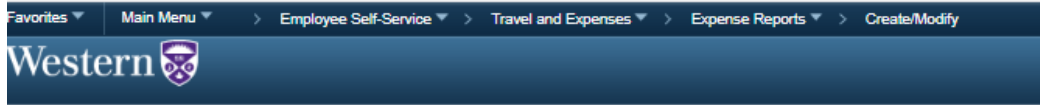
Step #5 – Filling out the top portion of the expense claim correctly.

a) *Business Purpose*: Select either 'Departmental Expense' or 'Conference'

b) *Report Description:* Please be as specific as possible! In the Example, I used "UpToDate Subscription." If it was a conference, using the name of the conference and dates the conference ran, such as "IMR Course Jan 20-21, 2020" would be great.

c) *Default Location:* There are only the three following options. Typically you would only use the second or third option if you were at a conference outside of Canada.

  1. Canada (CAN)
  2. United States (USA)
  3. Other-Outside Canada (OTH)

d) *Speedcode:* Click the hyperlink and under the speedcode field you will always you **DM13** for your DOM Allowance and UpToDate Subscriptions. If your division is paying for the expense, you will need to ask the program coordinator for the division speedcode they would like the expenses to come out of. Once you have entered this, click "OK" and it will take you back to the previous page to enter your expenses.

Step #6 – Entering your first expense claim

a) *Date*: The date the purchase was made. If it is a hotel expense, you would use the day you checked out of the hotel and the processed the payment.

b) *Expense Type*: For something like textbook, you will use "Misc-Supplies." For conferences, there are different lines you would potentially use for flights, accommodations, registration, etc.

> **NOTE:** If, for example, you have a hotel receipt that includes parking, you would need to separate these expenses onto two lines. One for "Accom - Hotel" and one for "Transport – Other" for the parking portion.

c) *Description*: The more detail you provide here the better! For UpToDate, I put the length of the subscription purchased. As this would have also been purchased in USD, I could make a note of how much it cost in USD.

d) *Payment Type:* Just leave this!

e) *Amount & Currency:* If you paid for something in another currency and want Western to pay the exact exchange you paid, you will want to enter the Canadian amount you paid. If you do this, you MUST include backup to show that this was the exchange rate you paid (ie. credit card statement, etc). If you want Western to pay you using their default exchange rate, you would put in the amount paid and change the currency field to reflect the currency the invoice is in.

f) *Billing Type*: Just leave this!

g) *Location:* This has the same three options as the Default location in the header from Step #5. You will switch this based on where the expense happened or was made.

h) *Merchant:* company you purchased the item from, airline, name of hotel, etc.

i) *Accounting Details*: You will want to expand the Accounting Details. As long as you filled out the speedcode field in Step #5, it is okay that the speedcode field is blank here. You MUST change the "Account" to one of the following:

> **UpToDate Subscription = 622403**
>
> **DOM Allowance = 645820**

This year, as the DOM Education office has offered to pay half of a one year subscription for all residents, you will need to click the "+" sign at the end of the accounting line to add the second row of accounts. You will then need to divide the amount between the two lines and code one line to the UpToDate account and one to your DOM Allowance Account. In a case like this with a second line, you will want to enter the speedcode as DM13 for the second line to avoid an error.

Step #7 – To add another expense line, you will click the "+" sign next to the currency field to add an additional expense line below. If you are doing several expense lines, PLEASE make sure you are regularly clicking "Save for Later" at the top of the page. It will not take you off of this page, so you can keep working. It will simply save your work should something happen that you get kicked out.

Step #8 – To submit your claim you will click on "Summary and Submit" in the top right corner.

It will bring you to this page where you will check the circle box and then "Submit Expense Report." It will bring you to a confirmation page that will have a little blue link that says something similar to "Print Expense Cover Page." You will need to print this or save it to submit with your receipts for review.

**Step #9** – Submitting receipts to DOM Finance

Combine your cover page and all your receipts into **one** comprehensive document and email it to DOMEXPENSES@lhsc.on.ca.   If you have original receipts, such as instances where you bought a book from a physical store, those original receipts must be submitted to our office.

Checking the Status of Your Expense Claim

You will repeat steps #1 & 2 above, then select "View"
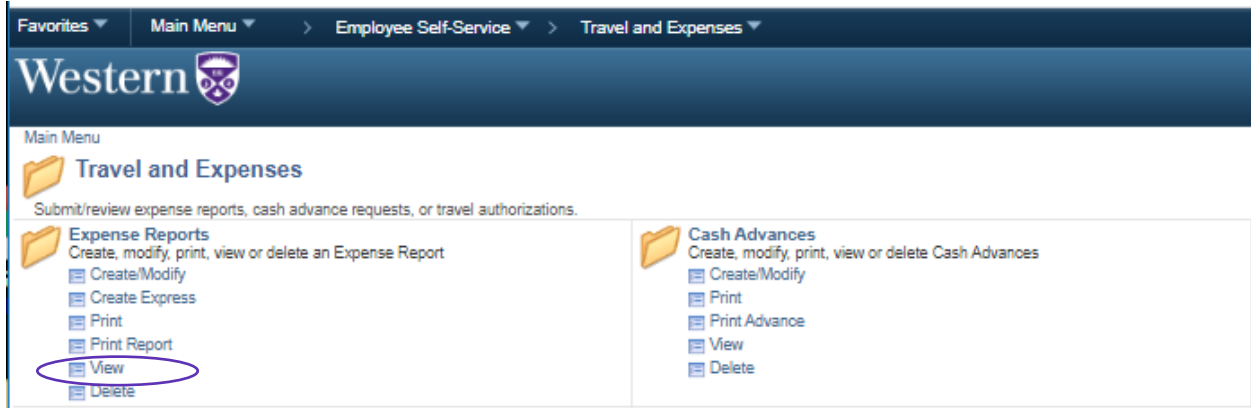
At this screen, you can go straight to search and it will pull up all the expense claims you have ever submitted online and give a quick status of the report.

From here, you can click into an expense claim and see additional information on whether it is sitting with a certain person that you could reach out to, access the cover page if you forgot to print it, etc. You will receive an email when the expense claim is processed by the travel desk notifying you that you will receive your refund through direct deposit to your account that you registered through the link that was sent to you a few weeks ago.

Support Needed for Expenses

Conferences/Courses
- Agenda for the event
- Proof of registration and payment
- Proof you attended/completed the course or conference (ie. name badge, certificate of completion, etc.)
- All receipts for expenses showing how the expenses were paid or that there is a balance of $0

Textbooks
- Receipt showing how the textbooks were paid for (ie. an Amazon Order Confirmation will not suffice. We need to see it was fully paid for and how)
- Proof, such as a picture of the book with your hospital ID next to it to show that it was in fact delivered and received by you

Purchasing in Difference Currencies
- Unless you are using Western's default exchange rates, you will need to provide proof of the exchange rate you are claiming

Mileage
- You will need to provide a Mapquest image showing the starting point and destination for support of mileage driving. When you enter these amounts in your expense claim, they will be automatically calculated.

Journal Club/Other DOM Education Events
- **Please check with the DOM Education office to verify what speedcode and account they would like you to use for your expense claim**
- List of Attendees
- Original detailed restaurant receipts, etc.

If you have any questions, please email DOMEXPENSES@lhsc.on.ca and we will be happy to help you out!