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	To save a report mid-completion, see beginning of step 6.

1 | LOGIN to Peoplesoft

- At work, select **Peoplesoft** from the Partners menu
- At home, access Peoplesoft with your Partners username and password from **ibridge.partners.org**

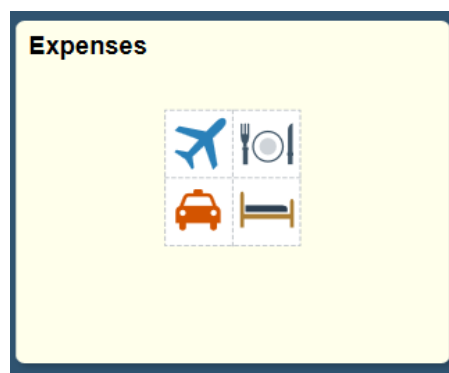


At the top of the page, beneath “Welcome ***your name***” ensure the drop down says “**Employee Self Service**”

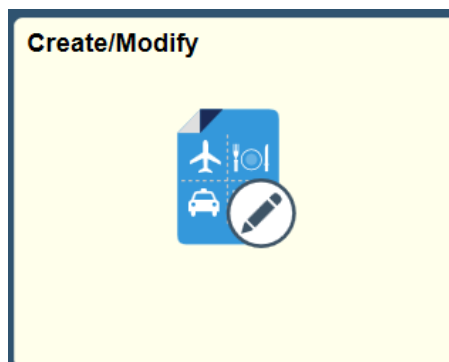
2 | OPEN a new expense report.

- Select the **Expenses** tile.

Addendum: if you do not have the Expenses tile, see **Addendum A**.



- Then, select the **Create/Modify** tile.



- Select the **magnifying glass**.

Expense Report

Find an Existing Value

Add a New Value

Empl ID



Add

Find an Existing Value | Add a New Value

- Select your Employee ID #
(pictured here)
- Then, select **Add**

Look Up Empl ID



Help

Empl ID

Name carr

[Basic Lookup](#)

Search Results

View 100 First 1 of 1 Last

Empl ID	Name
CARR, DENNIS	



3 | COMPLETE top portion of the expense report

Create Expense Report

Dennis Carr ?

*Business Purpose

*Report Description

Reference

*Approver

Default Location

*Business Purpose Detail

Expenses ?

Accounting Defaults

- **BUSINESS PURPOSE** From the drop down, select **"General Expense"**
- **REPORT DESCRIPTION** enter site abbreviation, **Cab**, first initial, first few letters of your last name
Examples
MGH Cab J Smith *NSMC Cab J Smith*
WRVA Cab J Smith *MGWest Cab J Smith*
- **REFERENCE** Leave blank.
- **APPROVER** Enter **DC60**
- **DEFAULT LOCATION** Select the **magnifying glass** & then select **Boston, Massachusetts**.
- **BUSINESS PURPOSE DETAIL** enter site abbreviation, **Cab Reimbursement** for your name, MD or DO
Example
MGH Cab Reimbursement for John Smith, M.D.

4 | COMPLETE accounting defaults

- Select **Accounting Defaults**

Create Expense Report

Dennis Carr ?

*Business Purpose

Default Location

*Report Description

*Business Purpose Detail

Reference

*Approver

Expenses ?



Accounting Defaults

Create Expense Report

Accounting Defaults

- For **GL Unit**, enter **1300**
- For **Dept**, enter **MGB091**
- Select **OK**.

Accounting Summary ?				
%	GL Unit	Dept	Phys	Project
100.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5 | **COMPLETE** individual expense report entries



To add expense lines, simply select the **PLUS** sign at the far right of an entry to add the next line (or the **MINUS** sign to delete a line.)

If you have many entries to enter at one time, you can select **QUICK-FILL** (instructions are in ***Addendum B***)

Accounting Defaults

Collapse All Add: | My Wallet (0) | Quick-Fill

Total 0.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
<input type="text"/>	Transportation - Miscellaneous	<input type="text"/>	<input type="text"/>	0.00	USD
*Billing Type <input type="text"/>		<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable <input type="checkbox"/> No Receipt		*Exchange Rate 1.00000000	Base Currency Amount 0.00 USD

Accounting Details

- **DATE** Select the date of your ride.
- **EXPENSE TYPE** Select **Transportation – Miscellaneous**
- **BILLING TYPE** Select **Local Expenses**
- **DESCRIPTION** Enter To/From or Precall/Postcall, site abbreviation Cab
Examples
To NSMC Cab
From WRVA Cab
Precall MGH Cab
Postcall MGH Cab
- **PAYMENT TYPE** Select the appropriate Payment Type
(N.B. if you use Apple Pay, select “Credit Card”)
- **AMOUNT** Enter the amount

6 | **UPLOAD** receipts

- Once you have entered all rides, select **Save for Later** in the top right of your screen.



(If at any point you want to stop filling out the expense report and continue later, you will select this same button. In order to save for later, at a minimum you have to fill out any field with an asterisk. For instructions on re-opening an expense report to finish it, please see **Addendum C.**)

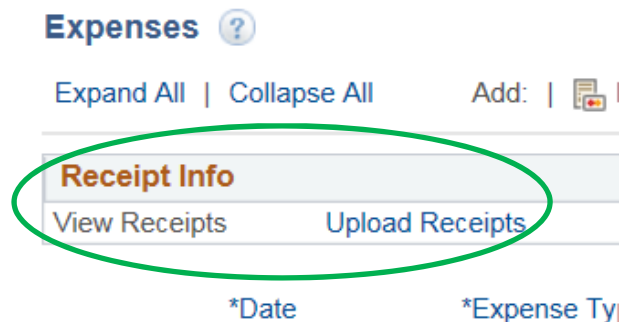
 Save for Later  Summary and Submit

*N.B. After hitting **Save for Later**, a red flag might appear. It simply alerts you to any field you forgot to fill out.*



- Now you will see a new task bar and link appear called **Receipt Info**

Here you can upload receipts and view receipts after uploading. PDF's work best. You can also upload jpeg if a screenshot or photo of receipt.



Receipts must show the last 4 digits of your CC and start/end points of ride.

7 | **REVIEW and SUBMIT** your report

- When you have uploaded all receipts, select **Save for Later**.
- Then select **Summary and Submit**.
- On the next page (below) you will read the attestation and need to select the **check box** before selecting **Submit Expense Report**


[New Window](#) | [Help](#) | [Personalize Page](#) |

 [Save for Later](#) | [Summary and Submit](#)

Modify Expense Report

Dennis Carr

*Business Purpose General Expense Report 0000651733 [Pencil](#)*Description Reference *Approver

Totals

[View Printable Version](#) [View Analytics](#)

Employee Expenses (1 Line)

0.01 USD

Non-Reimbursable Expenses

0.00 USD

Cash Advances Applied

0.00 USD

Prepaid Expenses

0.00 USD

Amount Due to Employee**0.01 USD****Amount**

By clicking Submit, I certify that this report accurately describes the actual and necessary business expenses incurred in compliance with PHS policies unless specifically noted. I have not received reimbursement for these expenses from any other PHS entity or outside source.

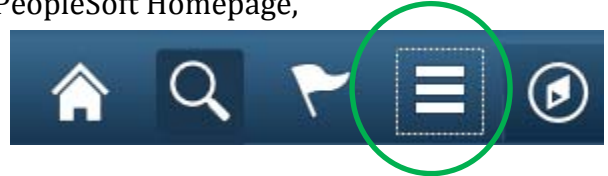
If airfare expense has been charged to a federally funded grant, I further certify that best efforts were made to obtain the lowest reasonable commercial airfare for such travel. I further certify that no alcoholic beverages were included in any expenses charged to a federal grant.

Approvers must be individuals senior to Payee. Please see PHS Policy and Procedure for Employee Business Expense for more information regarding approvers and circumstances requiring Special Approval.

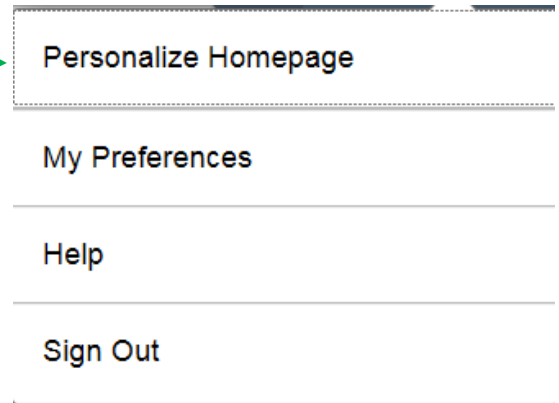
A | Addendum: Adding Expense Tile to PeopleSoft HomePage

- If you do not have the Expense Tile on your PeopleSoft Homepage,

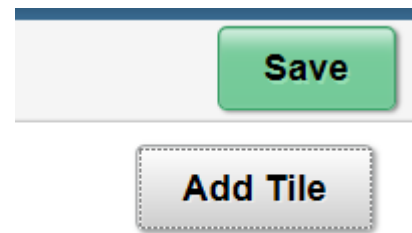
- Select the 3-line icon in the top right.



- Select **Personalize Homepage**.



- Select **Add Tile** in the top right.



- In the popup menu, scroll down, select **Employee Self-Service - FIN**, then select **Expenses**.

- To finish, select the Green **Save** button.
You will be taken back to your homepage, which now should have the Expenses tile.

B | Addendum: Using the Quick-Fill Feature

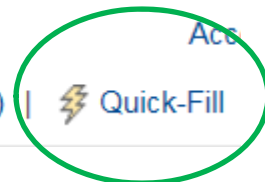
- Select the **Quick-Fill** button.

Expenses ?

Expand All | Collapse All

Add: | My Wallet (0)

Quick-Fill



- Enter your **Date – Range** in the popup dialog.
- Scroll down and check the box for **Transportation-Miscellaneous** under the **All Days Column**.
- Select **OK**
- You will be brought back to your expense report with the desired number of line entries to complete. ***This only will prefill date and expense type – You will still need to go back to Step 5 on p. 5 and continue.***
 - Quick Fill is useful if you have consecutive dates.
 - It is also useful even if you do not have consecutive dates.
Say you have 10 cab rides that are not on consecutive days. In Quick-Fill, select any period of 10 consecutive days (then select **Transportation-Miscellaneous** in the **All-Days Column**) and hit OK.
 - When you are brought back to the report, you have 10 lines pre-filled with “transportation-miscellaneous.”
You will simply need to correct the dates on each one, and complete each line entry (This will only save you hitting the **PLUS** sign after each line).

Quick-Fill

He

Enter the date range you want applied to the expenses you will be adding to the report. Then choose the expense types and whether you want to add one instance of the expense type or have an entry of that expense type for each day within the date range.

Date Range

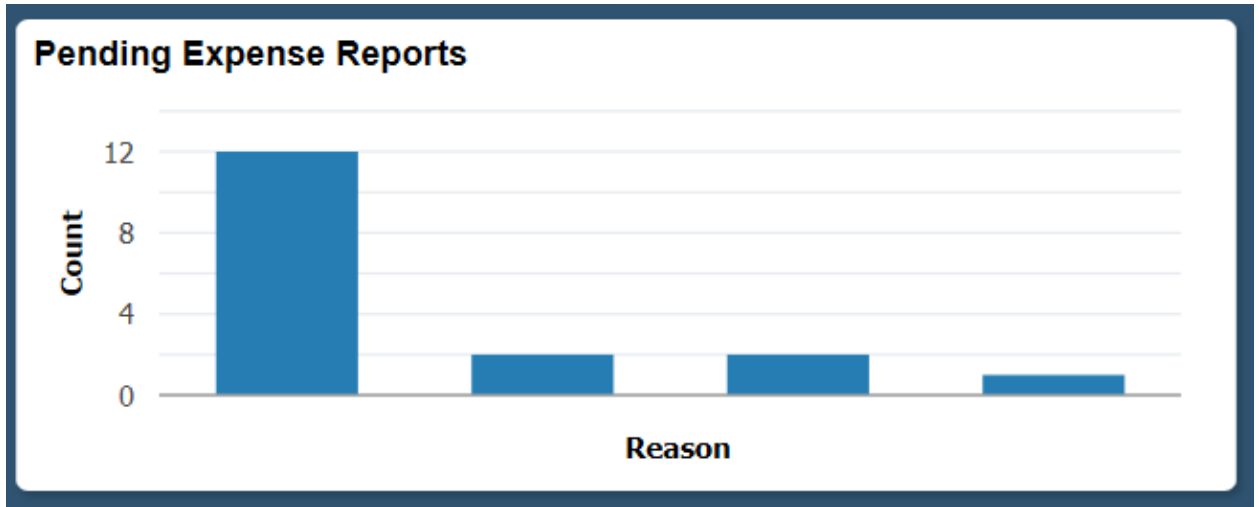
From To

Add Expense Types:

One Day	All Days	Expense Type
<input type="checkbox"/>	<input type="checkbox"/>	Lunch
<input type="checkbox"/>	<input type="checkbox"/>	Membership Dues
<input type="checkbox"/>	<input type="checkbox"/>	Mileage
<input type="checkbox"/>	<input type="checkbox"/>	Other Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Parking
<input type="checkbox"/>	<input type="checkbox"/>	Registration Fees
<input type="checkbox"/>	<input type="checkbox"/>	Rental Car
<input type="checkbox"/>	<input type="checkbox"/>	Subscriptions
<input type="checkbox"/>	<input type="checkbox"/>	Tolls
<input type="checkbox"/>	<input type="checkbox"/>	Transportation - Miscellaneous

C | Addendum: Re-Opening a Saved Expense Report to Finish

- Login to **Peoplesoft** and select the **Expenses** tile.
- Select the **Pending Expense Reports** tile.



- Select the **REPORT ID (in blue)** of the report you wish to finish.

Reason ◇	Employee ◇	Created Dt ◇	Report ID ◇	Report Description ◇
Saved for Later		05/21/2018	0000651791	Test

