

Reimbursement for CALGB Travel

Instructions for Partners Healthcare Employees

April 2011

These instructions are intended for use by CALGB travelers authorized to be reimbursed by the CALGB Chair's Office for costs incurred while traveling on CALGB business.

NOTE: Partners Healthcare employees must submit expenses using the online Expense Module on Peoplesoft.

Please visit http://pulse.partners.org/services/training_expenses.htm for information on using the Expense Module. If you do not currently have access to the Expense Module on Peoplesoft, please visit <http://pulse.partners.org/howto/index.htm> to self enroll.

1. Log into PeopleSoft, Financials Production and navigate to: Employee Self-Service, Travel & Expense Center, Expense Report, Create.
2. In the Approver field, enter kef26 (Katherine Faherty)
3. Fill in all fields in the General Information section [except Reference field]
4. Click on link to enter/verify your accounting information
 - a. GL Unit: 2200
 - b. Dept: 000000
 - c. Project: to be provided after meeting
5. Enter each expense item by completing the Expense Type, Expense date, Amount spent, Payment Type and Billing Type. When entering mileage, ignore Amount Spent field – miles get entered on next screen
6. Click to enter additional required expense detail.
7. Click after each expense item is entered.
8. Once Expense Report is complete, click at bottom of page.
9. Confirm (Attest) that one's Expense Report is accurate.
10. Click link at bottom of page.
11. Submit receipts by uploading scanned receipts.
 - a. To Upload:
 - i. Click link.
 - ii. Select file you wish to upload, click open, click .