

Travel Advances & Reimbursement Claims Processes

Log-in to PeopleSoft Financials:

<https://finance.uwo.ca/psp/fsprdweb/?cmd=login&languageCd=ENG&>

Login with Western ID and Password

- Select “Expense Reimbursement”
- Select “Expense Reports” or “Cash Advances”
 - Select Create/Modify – to start
 - Upload each receipt for each expense line item

Once all items/receipts entered, go to “Expense Summary” and then “Notes and Research Documentation”:

Travel Advances:

- Include a description of travel (i.e., conference, research meeting), time period, location and itemize use of travel funds (i.e., \$500 for hotel, \$300 train/taxi, \$300 meals; \$500 flight).
- Working relationship to account holder if not P.I. (i.e. Graduate Student, Postdoc Fellow, etc)
- Minimum travel advance \$500

Travel/Reimbursement Claims:

- Working relationship to account holder if not P.I. (i.e. Graduate Student, Postdoc Fellow, etc)
- Full name of conference/meeting/field trip and location
- Start and end dates of travel
- If claim is for supplies or equipment, identify purpose in conducting research / academic use.

Note: We can pay your conference fees in advance via Corporate Credit Card & assist with booking flights – See [Engineering Finance & Stores](#)

Resources

Training: (see Travel & Expense Reimbursement & Travel Advance under Corporate Accounting):

http://uwo.ca/finance/training_reference/index.html#FinancialSystems

Travel Policy: https://www.uwo.ca/univsec/pdf/policies_procedures/section2/mapp216_procedure.pdf

New Travel Procedures:

https://www.uwo.ca/finance/news/2018/revised_travel_expense_procedures_effective_july_1_2018.html

Updated: February 9, 2021