

Travel Advances & Claims Processes

Log-in to PeopleSoft Financials:

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

Login with Western ID number and Password

- Select “Employee Self-Service” from left menu
- Select “Travel & Expense”
 - Under Cash Advances
 - Select Create/Modify – to start Advance
 - Under Expense Reports
 - Select Create/Modify – to start Travel

Under “Event Details 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 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.

After online submission: Print off “Detailed Expense Report”, attach supporting documents in the order they appear and forward to Engineering Finance and Stores (TEB 40)

Note: *We can pay your conference fees in advance via Corporate Credit Card & assist with booking flights – See Engineering Finance & Stores (TEB 40).*

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