

# Member Expense Portal User Guide

**Public Service Alliance of Canada**

## TABLE OF CONTENTS

1	Overview .....	3
2	Changes to PSAC Travel Policy.....	4
2.1	Expense Claim Submission Deadline .....	4
2.2	Changes to Air Fare Equivalency (AFE) Rules .....	4
2.3	Family Care Policy (FCP).....	5
2.4	Receipts .....	6
3	Log On Information.....	7
4	Expense Claim Submission .....	8
4.1	Submit an Expense Claim >> Member Info .....	8
4.2	Submit an Expense Claim >> Event/Activity Info .....	10
4.3	Submit an Expense Claim >> Travel Status .....	10
4.4	Submit an Expense Claim >> Family Care.....	12
4.5	Submit an Expense Claim >> Salary Entitlement.....	14
4.6	Submit an Expense Claim >> Expenses.....	16
4.7	Submit an Expense Claim >> Loss of Salary.....	19
4.8	Submit an Expense Claim >> Summary .....	21
5	Expense Claim Audits .....	24
6	Need Help? Who to Contact for Assistance .....	25
7	Appendix A – Glossary .....	26
8	Appendix B – Authorization Form for EFT Direct Deposit.....	27
9	Appendix C – List of Employers.....	28
10	Appendix D – List of Screen Shots .....	34
11	Appendix E – Frequently Asked Questions .....	35

# 1 Overview

The FIN-039 resolution was passed at the 2012 PSAC Triennial Convention. This resolution tasked PSAC to provide a means for membership to submit claims online and give the members an option to receive their reimbursements through EFT (Electronic Funds Transfer).

The portal was launched on September 15<sup>th</sup>, 2014 and was gradually made available to members after that date. This portal now allows members to submit their claims electronically via the Member Expense Portal (MEP) located on the PSAC Member Portal website (<http://psacunion.ca/>). As part of this automation, members can also submit their banking information through the portal in order to start receiving their expense claim reimbursements via direct deposit.

The MEP allows members to log onto the PSAC website to submit expenses incurred during an event/activity in which they participated. Any claims submitted by the member through the MEP get posted to the Finance Administrative Portal (FAP) where PSAC Event Administrators, Approvers and Finance staff can view and process them for reimbursement. The MEP eliminates the current paper member expense claim forms.

**MEP allows members to:**

- View PSAC events they've attended
- Enter expense claims against those events
- Submit their expense claims for review, approval and processing in the FAP

## 2 Changes to PSAC Travel Policy

It is important to note that, as a result of the MEP project, some of the provisions within the PSAC Travel Policy were modified in order to simplify and standardize the business processes around expense claiming as well as to expedite the processing of expense claims in general.

A summary of the changes brought to the policy are highlighted below. These changes have been reflected in greater detail in the PSAC Travel Policy which can be found on the PSAC Member Portal website (<http://psacunion.ca/psac-travel-policy>).

The changes have taken effect on Monday, September 15<sup>th</sup>, in order to coincide with the anticipated launch of the Member Expense Portal (MEP). As a result, the changes to the PSAC Travel Policy are applicable to all events taking place as of September 15<sup>th</sup>. These changes will also be applicable to all claims, whether they are submitted online or in paper copy.

Please note that going forward, for claims submitted for past events (ie. prior to September 15<sup>th</sup>, 2014), only paper forms will be accepted. Therefore, original receipts must be attached to these claims. Electronic claims cannot be accepted for prior events due to the fact that the automated business rules in the Member Expense Portal are reflective of the new PSAC Travel Policy changes and would therefore not be in line with the modified sections of the policy. In addition, members have not been associated with historical events in the FAP and could therefore not have access to historical events in the MEP.

### 2.1 Expense Claim Submission Deadline

*Expense claims are to be submitted to PSAC Finance within 90 days following an activity.*

The introduction of a submission deadline will ensure expenses are reflected in the appropriate fiscal period as well as encourage members to file their claims in a more timely fashion.

### 2.2 Changes to Air Fare Equivalency (AFE) Rules

*Members who choose to use their Privately Owned Motor Vehicles (POMV) will claim the lesser of the actual kilometers driven and the applicable PSAC kilometric rate plus parking or up to a maximum of \$700.*

Changes to the AFE were made in order to ensure a more fair, consistent and transparent application of this reimbursement guideline. It should be noted that all other provisions contained within the existing Travel Policy remain unchanged.

## 2.3 Family Care Policy (FCP)

*Members will be reimbursed the costs for care during the day outside normal work/school/daycare hours at the following rates: i) the actual amount up to a maximum of \$80 per day (for each 24 hour period) for the first family member and ii) the actual amount up to a maximum of \$55 per day (for each 24 hour period) for each additional family member. Aside from the change in reimbursement fees, all other provisions contained within the policy remain unchanged.*

Reimbursement is based on:

- Actual amount up to a maximum hourly rate of \$12 an hour up to the maximum rate of \$80 for the first child (for each 24 hour period); and
- Actual amount up to a maximum hourly rate of \$12 an hour up to the maximum rate of \$55 for the second child (for each 24 hour period).

*A “24 hour period” is defined as a day beginning at 7:30 a.m. and ending the next morning at 7:29 a.m. Actual care provided within these hours will be reimbursed.*

This change to the FCP simplifies the existing policy by removing time of day restrictions, still allowing for the reimbursement of actual licensed caregiver expenses with supporting receipts, while streamlining the policy as a whole for expedited processing.

It should be noted that the underlying Family Care Policy (FCP) is intended to assist the member in covering **additional fees** incurred as a direct result of attending an authorized PSAC activity. Where the member is the sole caregiver at the time of the authorized union activity, the FCP will cover costs for care during the day **outside normal work/school/daycare hours**. Family care costs that would have ordinarily been incurred during work hours had the member been at his/her place of work are not covered.

If a claim including Family Care is selected for audit, the members will be required to provide details on the dependent care, including the hours during which family care fees were incurred. Whether audited or not, Family Care receipts should always reflect the hours of care expensed during the PSAC event in order to justify the reasonableness of the hourly rate reimbursed. The hours of care must also be reflected in the Justification box of the Family Care tab.

### 2.4 Receipts

*For claims submitted via the MEP only, no receipts will be required unless the claim is selected for audit, at which time, electronic receipts will be accepted.*

For unaudited claims, receipts must be retained by the member for a period of 2 years after the event end date in case of future audit requirements. For claims submitted in hard copy form, original receipts must accompany the claim in order to be processed.

As per section 2.1.3 of the Travel Policy it is the responsibility of the person authorizing travel and the traveller to be familiar with the PSAC Travel Policy. Any questions regarding the application of the policy should be reviewed with the person authorizing the travel.

#### Symbols and Conventions

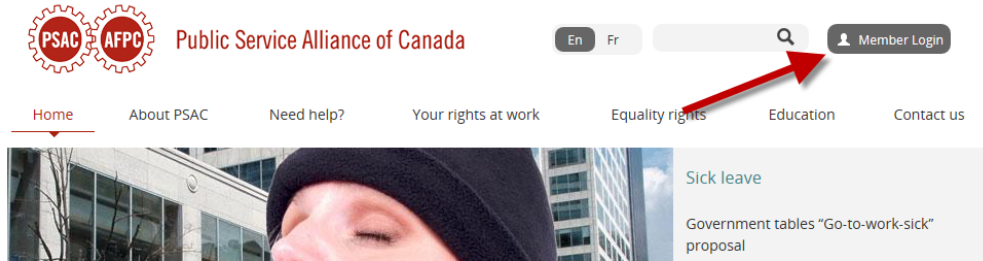
This manual uses the following conventions to refer to navigation and other information.

Symbol	Description
*	The asterisk * symbol indicates the mandatory fields on the screen. The information must be entered in these fields prior to saving the record.
Member Info >> Edit my profile	The (>>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar.

### 3 Log On Information

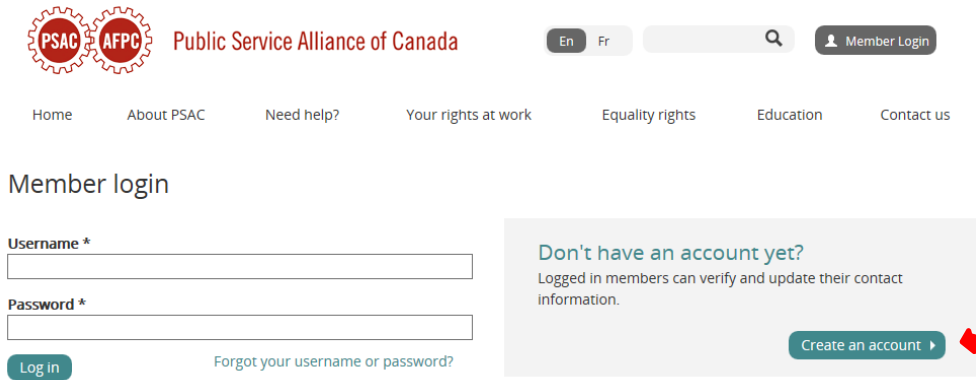
The log on to the MEP is managed through regular login to the PSAC Member Portal website.

**Step 1** – Connect to <http://psacunion.ca/> site and click on ‘Member Login’.



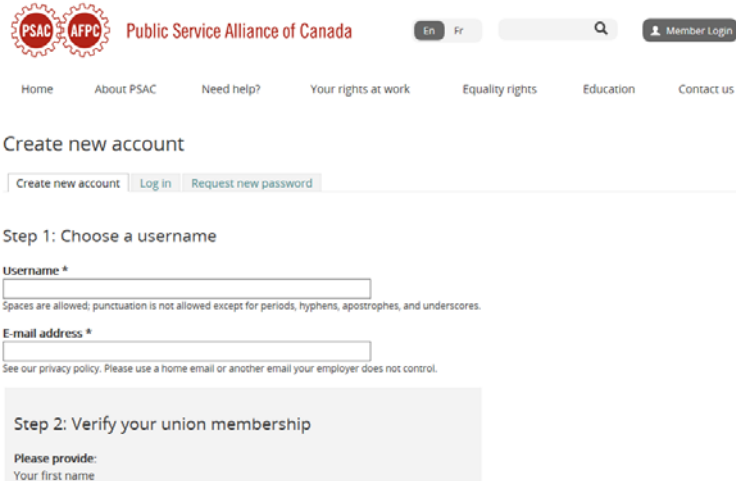
**Figure 3.1 – PSAC Union Home Page**

**Step 2** – Enter your member Username and Password



**Figure 3.2 – PSAC Member Login Page**

**Step 3** – If you do not yet have an account on the PSAC web site, create one.



**Figure 3.3 – PSAC Create New Account Page**

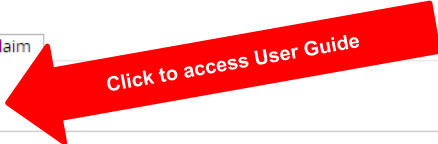
## 4 Expense Claim Submission

### 4.1 Submit an Expense Claim >> Member Info

Clicking on the “Submit an Expense Claim” tab will open the “Member Info” tab on the vertical menu.

Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide 

Member Info	Name and Address	PSAC ID
Event/Activity Info	Test	928792
Travel Status	Memberportal	Phone (613) 560-0000
Family Care	233 Gilmour, Suite 400	Home Email test@gmail.com
Salary Entitlement	Ottawa	Work Email
Expenses	Ontario	
Loss of Salary	K2P 0P1	
Summary		

I have pre-approved expenses related to a disability.  
As per the PSAC Travel Policy, the PSAC will reimburse additional, reasonable and pre-authorized expenses to the accommodation of a disability.

I would like all of my expense claims to be reimbursed by: \*

Cheque  
 Direct Deposit

You will be prompted to submit a copy of a void cheque at the end of the claim. You can provide this copy electronically, by regular mail to: 233 Gilmour St., Suite 400, Ottawa ON K2P 0P1 or by fax to 613-560-5547.

[Edit my profile](#)

Reset Save / Continue

Figure 4.1 – Member Info Tab

#### Step 1 - Review Member contact information

In order to ensure that reimbursements are properly routed, members must ensure the contact data on file is updated and accurate. Click on the [Edit my profile](#) link at the bottom of the screen to modify any information as required. Once changes are made, click on the [Save](#) button and then re-select the [Submit an Expense Claim](#) tab. The member info tab in the MEP is linked to UnionWare, therefore any modifications made to the member information in this tab will automatically update UnionWare.

### Step 2 - Checkbox for travellers with disabilities

As per section 3.12 of the PSAC Travel Policy, the PSAC will reimburse additional, reasonable and pre-authorized expenses to the accommodation of a disability. Members with disabilities can therefore check this box to inform the approver that additional expenses related to the accommodation of a disability were incurred for the particular event they attended. Upon checking this box, an 'Explanation' text box will appear, allowing the member to provide additional information regarding their disability.

### Step 3 – Select Reimbursement Option

Members will have the option of being reimbursed by either cheque or Direct Deposit. If Direct Deposit is preferred, the member simply needs to click on “Direct Deposit” and fill out the necessary banking information. A **void cheque** must be scanned or sent to Finance in order for the Direct Deposit setup to be finalized. If the preference is to submit this information via fax or email, please fill out the form in Appendix B along with a void cheque to the coordinates provided at the bottom of the form.

- I have pre-approved expenses related to a disability.  
As per the PSAC Travel Policy, the PSAC will reimburse additional, reasonable and pre-authorized expenses to the accommodation of a disability.

I would like all of my expense claims to be reimbursed by: \*

- Cheque  
 Direct Deposit

You will be prompted to submit a copy of a void cheque at the end of the claim. You can provide this copy electronically, by regular mail to: 233 Gilmour St., Suite 400, Ottawa ON K2P 0P1 or by fax to 613-560-5547.

#### Banking information

You will be prompted to submit a copy of a void cheque at the end of the claim. You can provide this copy electronically, regular mail (233 Gilmour St., Suite 400, Ottawa, ON, K2P 0P1), or fax (613-560-5547).

Name of Financial Institution



The image shows a sample void cheque with callouts pointing to the MICR lines at the bottom. The callouts are: "1 2 3 4 5", "000", and "2 3 4 5 00".

Transit No.	Institution No.	Account No.
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Edit my profile](#)

[Reset](#)

[Save / Continue](#)

**Figure 4.2 – Direct Deposit Information (Member Info Tab)**

**Step 4 - click on “Save/Continue”.**

## 4.2 Submit an Expense Claim >> Event/Activity Info

The Event/Activity Info screen will provide members with the list of events they've attended against which they are authorized to submit an expense claim.

Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info

Event/Activity Info

Travel Status

Family Care

Salary Entitlement

Expenses

Loss of Salary

Summary

You have been registered to the following PSAC events/activities. Please select one.

User manual - OTTAWA - 2014-11-17 (11:45 am) - 2014-11-21 (5:00 pm)

Name: User manual

Type: EDUCATION Start: 2014-11-17 (11:45 am)

Description: For education End: 2014-11-21 (5:00 pm)

Location: OTTAWA

Reset Save / Continue

Figure 4.3 – Event/Activity Info Tab

**Step 1** – Select the Event/Activity against which to submit an expense claim.

**Step 2** – Confirm that the activity information is consistent with the activity you attended.

**Step 3** – Click Save/Continue.

## 4.3 Submit an Expense Claim >> Travel Status

The travel status provides information on the member's departure time from home (or office) to attend the event, as well as the arrival time back home or office from the specified event. The travel status will be used to determine which expenses the member is entitled to claim based on their entire travel time for the PSAC event.

The following information must be provided:

- Date and time of departure from home/work to event
- Date and time of arrival to home/work from event
- Departure location
  - City\* - City of the departure location. The city will default to the work location of the member but can be changed.

## Member Expense Portal User Guide

- Province\* - Province of the departure location.
- Arrival location
  - City\* - City of the arrival location. The city will default to the location of the event but can be changed.
  - Province\* - Province of the arrival location.

Once the above information has been provided, click “Save/continue”.

### Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info	The departure and arrival times selected for your travel status will be used to determine which expenses you are entitled to claim based on PSAC policy.
Event/Activity Info	
Travel Status	Date and time of departure from home/work to event/activity
Family Care	Date * Hour * Minute * AM/PM * 2014-11-03 01 00 AM
Salary Entitlement	
Expenses	Date and time of arrival home/work from event/activity
Loss of Salary	Date * Hour * Minute * AM/PM * 2014-11-14 10 00 PM
Summary	

Departure location	Arrival location
City * Ottawa	City * OTTAWA
Province/Territory * Ontario	Province/Territory * Ontario

Reset Save / Continue

Figure 4.4 – Travel Status Tab

## 4.4 Submit an Expense Claim >> Family Care

Use this screen to indicate if family care was required during the attended event. The default is set to “No”.

Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info	Did you require family care to attend this event/activity? <input checked="" type="radio"/> No <input type="radio"/> Yes
Event/Activity Info	PSAC Policy will cover costs for care <u>outside normal work/school/daycare hours</u> . Please ensure you indicate the dates and times you required dependent care on your receipts.
Travel Status	
Family Care	Caregiver information
Salary Entitlement	Caregiver/Agency Name <input type="text"/> Caregiver/Agency Phone Number <input type="text"/>
Expenses	Caregiver/Agency Address <input type="text"/>
Loss of Salary	This caregiver is: <input checked="" type="radio"/> Unlicensed <input type="radio"/> Licensed
Summary	

**Add a Family Member**

Fill out the first name, last name, age, and relation inputs for each family member under the care of the caregiver. Clicking the Add button will dynamically add the family member to the family members table that follows.

First name	Last name	Relation	Age	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Number of days being claimed  Total claimed (\$)

I attest to having pre-approved exceptions which deviate from the Family Care policy.  
If you don't have a pre-approved exception please contact MembExpClaims@psac-afpc.com.

Reason (justification)

Please provide details: dates, times, etc.

Figure 4.5 – Family Care Tab

It should be noted that the underlying Family Care Policy (FCP) is intended to assist the member in covering **additional fees** incurred as a direct result of attending an authorized PSAC activity. Where the member is the sole caregiver at the time of the authorized union activity, the FCP will cover costs for care during the day **outside normal work/school/daycare hours**. Family care costs that would have ordinarily been incurred during work hours had the member been at his/her place of work are not covered.

## Member Expense Portal User Guide

---

If a claim including Family Care is selected for audit, the members will be required to provide details on the dependent care, including the hours during which family care fees were incurred. Whether audited or not, Family Care receipts should always reflect the hours of care expensed during the PSAC event in order to justify the reasonableness of the hourly rate reimbursed. The hours of care must also be entered in detail in the Justification box of the Family Care tab.

If no family care was required – retain default selection and click “Save/Continue”.

If family care was required – select “Yes”. The following information must be provided:

- Caregiver / Agency Name
- Caregiver / Agency Phone Number
- Caregiver / Agency Address
- Caregiver’s license number (if applicable)
- Name, relation and age of dependants for which care was required
- Number of days (based on a 24 hour period) for which care was required
- Total amount requested for reimbursement. See PSAC Family Care Policy for additional information (<http://psacunion.ca/family-care-policy>) on maximum reimbursable amounts.

Reimbursement is based on:

- Actual amount up to a maximum hourly rate of \$12 an hour up to the maximum rate of \$80 for the first child (for each 24 hour period); and
- Actual amount up to a maximum hourly rate of \$12 an hour up to the maximum rate of \$55 for the second child (for each 24 hour period).

*A “24 hour period” is defined as a day beginning at 7:30 a.m. and ending the next morning at 7:29 a.m. Actual care provided within these hours will be reimbursed.*

- As per the Family Care Policy, consideration will be given to special needs or unusual circumstances (ie. special services or care is required for a dependent) resulting in costs which exceed the maximum reimbursable amount. Detailed information regarding the reasons for the preapproval must be provided in the allotted space.

Once all of the above information has been provided, click “Save/continue”.

## 4.5 Submit an Expense Claim >> Salary Entitlement

The Salary Entitlement tab can be used when the member is entitled to submit a claim for loss of salary before, during and after the event while in travel status.

Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info

Event/Activity Info

Travel Status

Family Care

Salary Entitlement

Expenses

Loss of Salary

Summary

Loss of salary for attending this event/activity will be paid by the PSAC?

No (paid by my employer)

Yes

Social Insurance Number

Required for income tax.

Employer

Canada Post Corporation

Classification / Level

A05 - ADMINISTRATIVE

Step

--Select--

Department

If required by your collective agreement, please enter your step, department, zone and seasonal.

Zone

If required by your collective agreement, please enter your step, department, zone and seasonal.

Seasonal

If required by your collective agreement, please enter your step, department, zone and seasonal.

Reset Save / Continue

Figure 4.6 – Salary Entitlement Tab

The following information must be provided:

- Will loss of salary be reimbursed by the PSAC?
  - Select “NO” if the loss of salary will be paid by the member’s employer
  - Select “YES” if the loss of salary will be paid by the PSAC
- If “NO” is selected, no additional information is required. Click “Save/Continue” and move to next session.
- If “YES” is selected, the following information must be provided:
  - SIN: A valid Social Insurance Number is required for T4 income tax slip preparation at year end;
  - Employer: Select the employer from the list of employers. If your employer is not in the list, please select “Other” and specify your

- employer. Please refer to *Appendix C* for a complete listing of existing employers in the MEP.
- Classification / Level: If the salary agreement is available in the system for the selected employer, the list of classifications/levels will be automatically displayed for selection. PSAC has automated the salary agreements for approximately 75% of the membership. If the salary agreement has not been automated, simply fill in the hourly salary rate on the right hand side.
  - Step: If the salary agreement is available in the system for the selected employer and the Classification/Level is selected from the list, the appropriate Step will be available for selection. If your collective agreement does not have a step, leave blank.
  - Department: If the salary agreement is available in the system for the selected employer and the Classification/Level and Step is selected from the list, the appropriate Department (if applicable) will be available for selection. If your collective agreement does not have a department, leave blank.
  - Zone: If a department is selected from the list, the appropriate zone (if applicable) will be available for selection if the salary agreement is available. If your collective agreement does not have a zone, leave blank.
  - Seasonal: If the zone is selected from the list, the appropriate seasonal info (if applicable) will become available for selection if the salary agreement has been automated in the system. If your collective agreement does not have a zone, leave blank.
  - Annual Salary: If the salary agreement is available in the system, the appropriate annual salary will be displayed. If the agreement is not available, only the hourly salary must be entered, manually.
  - Hourly Salary: If the salary agreement is available in the system, the appropriate hourly salary will be displayed. If the information is not available, the hourly salary will need to be entered.

Note: If the salary agreement is not available in the system, all the fields on the page will change to free-form text format so that the appropriate information can be entered manually. **Only Hourly Salary is mandatory in such a scenario.**

Once the above information has been provided, click “Save/continue”. This action will save any changes made to the current screen and will open the subsequent tab.


## 4.6 Submit an Expense Claim >> Expenses

The expenses tab is used to enter the various expenses for each member against a particular event. Each item entered in this tab will appear in the appropriate detailed expense grid day-by-day based on the selected travel status date range.

Test.Memberportal

View
Edit
Submit an Expense Claim

Member Expense Portal user guide

<b>Member Info</b>	To claim an expense, fill out the fields below, then click the <i>Add expense to claim</i> button.																																																																																																				
<b>Event/Activity Info</b>	Province: <input type="text" value="-- Select --"/> Type: <input type="text" value="-- Select --"/> Date From: <input type="text" value="2014-11-03"/> Date To: <input type="text" value="2014-11-14"/>																																																																																																				
<b>Travel Status</b>																																																																																																					
<b>Family Care</b>	Subtype: <input type="text" value="Please choose an expense type."/> Rate: <input type="text"/> Qty: <input type="text" value="12"/> Total: <input type="text" value="0.00"/>																																																																																																				
<b>Salary Entitlement</b>																																																																																																					
<b>Expenses</b>	<div style="text-align: right; margin-bottom: 10px;"> <span style="background-color: #007060; color: white; padding: 5px 15px; border-radius: 5px;">Add expense to claim</span> </div> <div style="text-align: center; margin-bottom: 10px;">  </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Date From</th> <th style="width: 15%;">Date To</th> <th style="width: 10%;">Type</th> <th style="width: 10%;">Sub-Type</th> <th style="width: 10%;">Details</th> <th style="width: 10%;">Province</th> <th style="width: 10%;">Quantity</th> <th style="width: 10%;">Rate</th> <th style="width: 10%;">Amount</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>2014-11-03</td> <td>2014-11-03</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-04</td> <td>2014-11-04</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-05</td> <td>2014-11-05</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-06</td> <td>2014-11-06</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-07</td> <td>2014-11-07</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-08</td> <td>2014-11-08</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-09</td> <td>2014-11-09</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-10</td> <td>2014-11-10</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> <tr> <td>2014-11-11</td> <td>2014-11-11</td> <td>Meals</td> <td>Breakfast</td> <td>ON</td> <td>1</td> <td>\$15.75</td> <td>\$15.75</td> <td></td> <td>Remove</td> </tr> </tbody> </table>	Date From	Date To	Type	Sub-Type	Details	Province	Quantity	Rate	Amount		2014-11-03	2014-11-03	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-04	2014-11-04	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-05	2014-11-05	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-06	2014-11-06	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-07	2014-11-07	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-08	2014-11-08	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-09	2014-11-09	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-10	2014-11-10	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove	2014-11-11	2014-11-11	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove
Date From	Date To	Type	Sub-Type	Details	Province	Quantity	Rate	Amount																																																																																													
2014-11-03	2014-11-03	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-04	2014-11-04	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-05	2014-11-05	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-06	2014-11-06	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-07	2014-11-07	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-08	2014-11-08	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-09	2014-11-09	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-10	2014-11-10	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
2014-11-11	2014-11-11	Meals	Breakfast	ON	1	\$15.75	\$15.75		Remove																																																																																												
<b>Loss of Salary</b>																																																																																																					
<b>Summary</b>																																																																																																					

Reset
Save / Continue

Figure 4.7 – Expenses Tab

## Member Expense Portal User Guide

---

The following information is required on the Expenses tab. Some of these expenses are supported by calculations and business rules to prevent errors from occurring based on the PSAC travel policy.

- ‘Date From’ / ‘Date To’ of expense:
  - For the Meals & Incidentals expense types, fill in the date range of the specified expense.
  - For all other expense types, enter the specific date the expense was incurred.
  - For Accommodation >> Hotel, in order to simplify the claiming process, select the last day of stay at the hotel in the date range and claim the total from the hotel invoice instead of computing the daily hotel expense.
- Province: The list of provinces will be displayed. The province where the expenses incurred should be selected. Note: For meals, please specify the province in which the expense was incurred, as meal rates vary for the Northern territories. For mileage, please select the province in which the vehicle is licensed.
- Expense Type: The following expense types will be available for selection:
  - Accommodation/Incidental
  - Adjustment to Prior Claim
  - Family Care
  - Meals
  - Miscellaneous
  - Transportation
- Expense Sub-Type: Once the expense type is selected, the expense sub-type list will be available for selection based on the selected expense type. The following sub-types are available.
  - Accommodation/Incidental
    - Hotel
    - Incidental Allowance
    - Private Accommodation

*Note: In order to be eligible for an Incidental Allowance during your travel to and from a PSAC union event, you must have an **overnight stay** in a hotel or private accommodation.*
  - Adjustment to Prior Claim: This expense type is to be used when submitting a second (or more) claim against an event.
    - The expense sub-types from all the expense types will be available for selection.
  - Family Care
    - Dependent Care Cost

Note: This expense will be pre-filled from the Family Care tab.
  - Meals
    - Breakfast
    - Lunch
    - Dinner

*Note: In order to be eligible for a meal during your travel to and from a PSAC union event: **Departure time** must be **prior** to:*

*8:00 am for Breakfast*

*12:00 pm for Lunch*

*6:00 pm for Dinner*

**Arrival time** must be **after**:

8:00 am for Breakfast

12:00 pm for Lunch

6:00 pm for Dinner

- Miscellaneous
  - Equipment Rental
  - Event Paraphernalia
  - Facilities and Refreshments
  - Group Meals
  - Member Education Allowance
  - Member per diem fees
  - Other Miscellaneous Expenses
  - Printing
  - Registration Fees
  - Special Needs and Disabilities
  - Supplies
  - Telephone and Internet
- Transportation
  - Air
  - Airport Improvement Fee
  - Bus
  - Car Rental
  - Fuel
  - Mileage - # of km (select province in which vehicle is registered)
  - Parking
  - Taxis
  - Train
- Rate: The rate will default if the PSAC rates are available. The automated rates cannot be overwritten. Rates for Meals, Mileage, Incidental, Family care, per diem & allowance will automatically be filled based on approved PSAC rates.
- Qty (Quantity): The quantity field will default to the total number of days based on the dates specified in the 'To', 'From' date fields.
- Total: Automated calculation based on the quantity and rate.
- Add: The 'Add' button can be used to add the selected expense items to the table of expense.
- Reset: The Reset button will clear all the added expense line items from the list.
- Expense Items table
  - The Expense Items table displays the list of all expenses added for a claim. For each selected expense sub-type, one row gets added for every day the expense is claimed.

- Use the ‘Remove’ button on each row to delete an unwanted expense entry for any particular day.
- The table can be sorted by: Date From, Date To, Type and Sub-Type.

Repeat the above process for each expense type being claimed.

Once all the expenses have been added to the table, click “Save/continue”. This action will save any changes made to the current screen and will open the subsequent tab.

## 4.7 **Submit an Expense Claim >> Loss of Salary**

The following information is required on the Loss of Salary tab. Note: To date, PSAC has automated 25 rate tables from its largest collective agreements representing approximately 75% of its membership. See **Appendix C** for a listing of the employer rate tables that have been automated thus far. Only those annotated with \*\* have been automated.

Test.Memberportal

View
Edit
Submit an Expense Claim

Member Expense Portal user guide

Member Info	To claim loss of salary, fill out the fields below, then click the <i>Add salary-loss to claim</i> button.								
Event/Activity Info	Type	Date From	Date To						
Travel Status	Regular	2014-11-03	2014-11-07						
Family Care	Unit	Hours per day	Rate	Total per unit					
Salary Entitlement	Hourly		24.52	0.00					
Expenses	<span style="background-color: #007060; color: white; padding: 2px 10px; border-radius: 5px;">Add salary-loss to claim</span>								
Loss of Salary	Salary Details								
Summary	Date From	Date To	Type	Details	Unit	Quantity	Rate	Total	
	▼	▼	▼						
	2014-11-03	2014-11-03	Regular		Hourly	7.5	\$24.52	\$183.90	<span style="background-color: #ccc; padding: 2px 5px; border-radius: 5px;">Remove</span>
	2014-11-04	2014-11-04	Regular		Hourly	7.5	\$24.52	\$183.90	<span style="background-color: #ccc; padding: 2px 5px; border-radius: 5px;">Remove</span>
	2014-11-05	2014-11-05	Regular		Hourly	7.5	\$24.52	\$183.90	<span style="background-color: #ccc; padding: 2px 5px; border-radius: 5px;">Remove</span>
	2014-11-06	2014-11-06	Regular		Hourly	7.5	\$24.52	\$183.90	<span style="background-color: #ccc; padding: 2px 5px; border-radius: 5px;">Remove</span>
	2014-11-07	2014-11-07	Regular		Hourly	7.5	\$24.52	\$183.90	<span style="background-color: #ccc; padding: 2px 5px; border-radius: 5px;">Remove</span>
	<span style="background-color: #ccc; padding: 2px 10px; border-radius: 5px; margin-right: 100px;">Reset</span> <span style="background-color: #007060; color: white; padding: 2px 10px; border-radius: 5px;">Save / Continue</span>								

**Figure 4.8 – Loss of Salary Tab**

## Member Expense Portal User Guide

---

The following information is required on the Loss of Salary tab. Some of these fields are supported by calculations and business rules to prevent errors from occurring.

- ‘Date From’ / ‘Date To’: Enter the date range for this particular loss of salary item.
- Salary Type and Unit<sup>1</sup>: The following Salary Types are available for selection.
  - Regular
    - Hourly
    - Daily
  - Layday (only to be used by members classified as Ships’ Crews)
    - Daily
  - Lumpsum
    - Hourly
  - Supervisory coordinates
    - Hourly
    - % of hourly
  - Inmate Training Coordinates (combination of A B C D, and 01 02)
    - Hourly
    - % of hourly
  - Miscellaneous<sup>2</sup> (Must provide a reason in the “Please specify” box)
    - Hourly
    - % of hourly
  - Shift Premium hourly
    - Hourly
  - Week-end premium hourly
    - Hourly
  - Isolated post allowances (Environmental, Fuel, Shelter, Living) (Must provide a reason in the “Please specify” box)
    - Hourly
  - WSIB allowances
    - Daily
  - Facilitator allowance
    - Daily

*\*Additional Note – Salary Unit:*

- *For %: Enter a number not a decimal. Ex: 5% should be enter as “5” not “0.05”*
- *For Hourly: Enter the number of hours requested for that day. The value cannot exceed 24 hours.*
- *For Daily: No value to enter. Based on date range.*
- Hours (or quantity): The quantity will default based on the date range and salary unit. The quantity can be overwritten.

---

<sup>1</sup> If the salary agreement is not available in the system for the selected employer, only the ‘Hourly’ option will be available for selection.

<sup>2</sup> Used for second employer, or other unspecified loss of benefits.

- Salary Rate: Dependent upon the Salary Type:
  - If 'Regular' was selected:
    - If the rate table has been automated in the system, it will be automatically filled. If auto-filled, the rate cannot be overwritten.
    - If the rate table has not been automated in the system, enter the hourly salary rate.
  - If '% of hourly' was selected, the rate will be automatically filled based on the regular salary. Note: % of hourly will not work until the regular salary is entered in the salary list.
- Total: Based on the quantity and rate, the total will be calculated automatically.
- Add: The 'Add' button can be used to add the selected salary type to the salary grid.
- Loss of Salary Grid
  - The Loss of Salary grid displays the list of all loss of salary items added on a claim. One row gets added in this table for every day of loss of salary.
  - Use the 'Remove' button on each row to delete an entry for any particular day.
  - The table can be sorted by: Date From, Date To and Type.

Repeat the above steps for each Salary Type being claimed.

Once all the loss of salaries have been added to the table, click "Save/continue". This action will save any changes made to the current screen and will open the subsequent tab.

### **4.8 Submit an Expense Claim >> Summary**

The Summary tab displays the summary of all the information added on the claim. This tab is not editable. If any changes to the claim are required, the changes should be made on the tab that relates to the required change prior to clicking 'Submit'. Prior to submitting their expense claim, members should include supporting documents for Direct Deposit (ie. void cheque) and Family Care (ie. receipt for licensed care) when they are prompted to do so in the 'Attachments' section of the Summary tab. Supporting documents can be attached by clicking on  and browsing the location where the supporting document is located. Once the file is selected, click on  to add the file to the Summary tab.

# Member Expense Portal User Guide

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info	<b>Member Information</b>
Event/Activity Info	PSAC ID 928792
Travel Status	Employer Canada Post Corporation
Family Care	Classification A05 ADMINISTRATIVE
Salary Entitlement	
Expenses	<b>Event Information</b>
Loss of Salary	Name: Claude event
Summary	Type: EDUCATION Start: 2014-11-03 (9:00 am)
	Description: Claude event End: 2014-11-14 (5:00 pm)
	Location: anywhere
	<b>Expense Information</b>
	Meals \$78.75
	Expenses Total \$78.75
	Cash Advance (\$100.00)
	Net Expenses \$-21.25
	<b>Attachments</b>
	Supporting Documentation is required for this claim. Please provide scans of your receipts and/or void cheque for submission with your claim.
	<input type="checkbox"/> I would prefer to provide my supporting documentation by fax or email <i>Please note: Your claim will not be processed until all supporting documentation is recieved. Please include a copy of your claim summary with your supporting documentation.</i>
	Direct Deposit (copy of void cheque) * <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/> You may upload a jpeg, tiff, png, or gif image.
	<b>Administrator Information</b>
	Name Event Administrator2 Email gouri@psac-afpc.com Phone

Figure 4.9 – Summary Tab

## Member Expense Portal User Guide

---

If the claim was submitted successfully, a confirmation number will appear on the screen. This confirmation number along with a copy of the submitted expenses will be sent to the home email address provided on the Member Info tab.

Home    About PSAC    Need help?    Your rights at work    Equality rights    Education    Contact us

✔ Thank you for submitting your claim. Your claim ID is 103103. Please retain this number for your records.  
Please note that the amount reimbursed may differ from the amount submitted if loss of salary is claimed due to the withholding of applicable source deductions on salary. Recovery of cash advances and adjustments may also affect the net amount reimbursed.  
Please note that PSAC reserves the right to audit your claim. If selected for audit, **all receipts must be sent to Finance** electronically (MemberExpClaims@psac-afpc.com), by regular mail (233 Gilmour St., Suite 400, Ottawa ON K2P 0P1), or by fax at 613-560-5547.  
Claims selected for audit will only be processed for payment once your receipts are received and verified. **Receipts must be retained by the member for a period of 2 years after the event end date in case of future audit requirements.**  
An automatic email of your summary expense claim has been sent to your home email address from info@psacunion.ca. If you do not see the email in your Inbox, please check your junk mail in case the email was blocked.

Test.Memberportal

View   Edit   Submit an Expense Claim

---

**Figure 4.10 – Confirmation Number Prompt**

## 5 Expense Claim Audits

In order to ensure that internal control measures are maintained, Finance will be performing audits of select member expense claims. When an expense claim is selected for audit, Finance will contact the member (preferably via email when an email address has been provided in the Member Info tab). The member will be required to submit all receipts supporting the claim when the audit request is made. Only after the receipts are received and reviewed against the items claimed will the claim be processed for reimbursement.

Receipts can be sent in a number of ways to Finance:

- Scan: at the following email address – [finance-info-finance@psac-afpc.com](mailto:finance-info-finance@psac-afpc.com)
- Fax: at (613) 560-5547
- Regular mail: send to 233 Gilmour St, Suite 400, Ottawa ON, K2P 0P1, Attention: Member Claims

The audit functionality of the MEP is still under development. Eventually, members will have the ability to attach receipts directly into the MEP via scan (if that functionality is available to them).

## 6 Need Help? Who to Contact for Assistance

For direct assistance until December 31<sup>st</sup>, 2014:

Email: [finance-info-finance@psac-afpc.com](mailto:finance-info-finance@psac-afpc.com)

Telephone:            Luc Gour – A/Finance Officer            (613) 560-4222  
                             Jill St-John – Bookkeeper            (613) 560-2968  
                             Sophie Wang – Finance Officer            (613) 560-5561

Fax: (613)560-5547

Mailing Address:    233 Gilmour St, Suite 400  
                             Ottawa, ON  
                             K2P 0P1  
                             Attention: Finance-Member Claims

For direct assistance as of January 1<sup>st</sup>, 2015:

- 1) Contact the Event Administrator (EA) responsible for the particular event you are claiming against.

or

- 2) Email [finance-info-finance@psac-afpc.com](mailto:finance-info-finance@psac-afpc.com)

## **7 Appendix A – Glossary**

Abbreviations:

APP – Approver

EA – Event Administrator

FAP – Finance Administrative Portal

FCP – Family Care Policy

MEP – Member Expense Portal

DRAFT

## 8 Appendix B – Authorization Form for EFT Direct Deposit



### Direct Deposit Authorization for Electronic Funds Transfer (EFT)

**Contact Information**

Member Name: \_\_\_\_\_  
Complete address: \_\_\_\_\_  
Email address: \_\_\_\_\_

**Bank Account Information for Deposits**

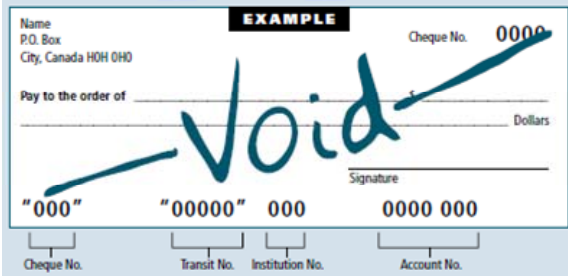
Please attach a blank cheque with your bank information on it. Write 'Void' across the front.

Type of Account:  Chequing  Savings

OR

For accounts without cheques, have your bank complete the following:

Type of Account:  Chequing  Savings  
Name of bank or other financial institution: \_\_\_\_\_



Address of branch where account is held: \_\_\_\_\_

Transit No.: \_\_\_\_\_ Institution No.: \_\_\_\_\_

**Authorization of Electronic Funds Payments**

I authorize the PSAC to deposit, by electronic funds transfer, payments owed to me by the PSAC. The PSAC will deposit the payments in the banking account designated above. I recognize that if I give incomplete or inaccurate information on this form, payments may be made to the wrong account.

Signature: \_\_\_\_\_  
Printed Name: \_\_\_\_\_  
Date: \_\_\_\_\_

Account No.: \_\_\_\_\_

Teller Stamp: \_\_\_\_\_

Please Email a PDF copy or mail a hard copy of the completed authorization form and void cheque:  
To: Vicky Daguere, Supervisor, Financial Accounting | Email: Daguerv@psac-afpc.com | Tel: (613) 560-4361 | Address: 233 Gilmour St, Suite 400, Ottawa, ON K2P 0P1

## 9 Appendix C – List of Employers<sup>3</sup>

Organizing  
Second employer  
New Employer  
AECL CANDU Operations  
Aéroport de Québec inc. (Ste-Foy, Quebec)  
Aéroports de Montréal  
Air North Charter & Training Ltd  
Aklavik Housing Authority  
All Nations' Healing Hospital Inc. (formerly known as Fort Qu'Appelle Indian Hospital Inc.)  
Amethyst Women's Addiction Centre  
Anishinabek Police Service  
Aramark Canada Ltd. - 15 Wing Moose Jaw  
ARINC International of Canada, ULC  
Arviat Housing Association  
ATCO Frontec - 15 Wing Moose Jaw, CFB Maintenance & Operational Support  
Atlantic Pilotage Authority, Halifax, N.S. \*\*  
AVENS  
Avion Services Corp.  
Baker Lake Housing Association  
Bank of Canada  
BC First Nation Health Authority  
Behchokò Kò Gha K'àodèe  
Best Theratronics  
BHP Billiton Diamonds Inc.  
Blue Water Bridge Authority  
Brandon University  
British Columbia Corps of Commissionaires, Seal Cove Coast Guard Base  
Burnt Church First Nation  
Calgary Airport Authority  
Cambridge Bay Housing Association  
Canada Council for the Arts  
Canada Ports Corp. Prescott  
Canada Post Corporation \*\*  
Canada Revenue Agency \*\*  
Canadian Centre of Occupational Health & Safety \*\*  
Canadian Corps of Commissionaires - Great Lakes & Core II Security Inc.  
Canadian Corps of Commissionaires - Halifax Regional Municipality (HRM) Unit  
Canadian Corps of Commissionaires - Ottawa Division  
Canadian Corps of Commissionaires (Victoria, The Islands)  
Canadian Corps of Commissionaires- Nova Scotia Divison (Halifax International Airport)  
Canadian Corps of Commissionaires, NB & Prince Edward Island  
Canadian Corps of Commissionaires-Kingston & Region Division  
Canadian Food Inspection Agency \*\*  
Canadian Institutes of Health Research \*\*  
Canadian Museum of History  
Canadian Museum of Human Rights  
Canadian Museum of Nature

---

<sup>3</sup> \*\* Denotes employer rate tables that have been automated in the MEP

## Member Expense Portal User Guide

---

Canadian Security Intelligence Service \*\*  
Casino Regina  
Centre for Aboriginal Human Resource Development (CAHRD)  
Centre hospitalier universitaire Sainte-Justine  
Charlottetown Airport  
Chesterfield Inlet Housing Association  
Child Development Centre  
Chrysalis Transition House Association  
Churchill Marine Tank Farm Company  
City of Dawson (The)  
City of Iqaluit  
City of Timmins Airport  
City of Whitehorse  
City of Yellowknife  
Clyde River Housing Association  
CMHC Granville Island, B.C.  
Communications Security Establishment \*\*  
Coral Harbour Housing Association  
Corporation de l'École Polytechnique de Montréal  
Corporation du Fort St-Jean  
Croix-Rouge  
DASC Industries  
Deer Lake Regional Airport Authority  
Deer Lodge Centre Inc.  
Defense Contract Management Agency - Americas (Canada)  
Deline Housing Association  
Deninoo Community Council  
École nationale d'administration publique ENAP  
Edmonton City Centre  
Edmonton Regional Airports Authority  
Enterprise Cape Breton  
Eskasoni First Nation  
Evergreen Forestry Management Ltd.  
Fondation de l'Université du Québec à Montréal  
Forintek Canada Corporation  
Fort McPherson Housing Association  
Fort Providence Hamlet Council  
Fort Providence Housing Association  
Fort Resolution Housing Authority  
Fort Simpson Housing Authority  
Fort Smith Housing Authority  
Freshwater Fish Marketing Corp.  
Gander International Airport Authority Inc.  
Georgian Downs Ltd  
GlobeGround Fuel Services Inc.  
Government of Nunavut  
Government of the Yukon  
Great Lakes Pilotage Authority, Cornwall  
Greater Fredericton Airport Authority Inc.  
Greater Moncton Airport Authority Inc.  
Grizzly Marine Services Ltd

## Member Expense Portal User Guide

---

Halifax International Airport  
Halifax Port Authority  
Halifax Transition House Association  
Hall Beach Housing Association  
Hamlet of Arctic Bay  
Hamlet of Arviat  
Hamlet of Baker Lake  
Hamlet of Cambridge Bay  
Hamlet of Chesterfield Inlet  
Hamlet of Clyde River  
Hamlet of Coral Harbour  
Hamlet of Fort Resolution  
Hamlet of Gjoa Haven  
Hamlet of Kugaaruk  
Hamlet of Kugluktuk  
Hamlet of Pangnirtung  
Hamlet of Pond Inlet  
Hamlet of Rankin Inlet  
Hamlet of Repulse Bay  
Hamlet of Resolute Bay  
Hamlet of Taloyoak  
Hay River Health & Social Services Authority  
Hay River Housing Authority  
Hearst, Kapuskasing and Smooth Rock Falls Counselling Services  
Help and Hope for Family Society  
House of Commons \*\*  
Hudson Bay Port Company  
I.M.P. Group Ltd - CFB Comox  
I.M.P. Group Ltd - CFB Gander  
I.M.P. Group Ltd - CFB Trenton  
Institut Tec@Art Rive-Sud Inc.  
Inuvik Housing Authority  
Iqaluit Housing Authority  
Kamloops Airport Ltd  
Kikitak Housing Association  
Klondike Visitors Association  
Koprash Investments Inc c.o.b. Sunlite Floor Cleaners (Hastings County) - CFB Trenton  
Koprash Investments Inc. c.o.b. Sunlite Floor Cleaners (Renfrew County) - CFB Petawawa  
Koprash Investments Inc. c.o.b. Sunlite Floor Cleaners (Simcoe County) - CFB Borden  
Kugaaruk Housing Authority  
Kugluktuk Housing Association  
Laurentian Pilotage Authority \*\*  
Leader of the Yukon New Democratic Party in the Legislature  
Liard River Ferry Crossing (Rowe Construction)  
Library of Parliament \*\*  
Listuguj Mi'gmaq First Nation Council  
MacKenzie River Crossing (Merv Hardy)  
MacKenzie Valley Construction Ltd  
Many Rivers Counselling and Support Services Society  
Marine Atlantic Inc.  
McGill University

## Member Expense Portal User Guide

---

MDS Nordion Inc.  
Memorial University of Newfoundland  
Metcalf Realty Company Limited  
Mohawk Council of Akwesasne  
Municipalité de Qikiqtarjuaq  
Municipality of Cape Dorset  
Municipality of Hall Beach  
Nakwaye Ku Child Care Society  
National Arts Centre  
National Battlefields Commission \*\*  
National Capital Commission  
National Gallery of Canada  
National Museum of Science & Technology  
Nats'ejée K'éh Treatment Centre  
NAV Canada (Multi-Group) \*\*  
Nishnawbe-Aski Police Services Board  
Nordion Int'l Inc. (Vancouver, B.C.)  
North Bay Airport Services (Jack Garland Airport for Frontec Corporation)  
North Peace Airport  
Northern Safety Network Yukon  
Northern Transportation Co. Ltd. (Edmonton, AB and Churchill, MB)  
Northwest Territorial Government  
Northwest Territories Power Corp.  
Nuna Contracting Limited  
Nunavut Tunngavik Incorporated  
Office of the Auditor General \*\*  
Office of the Superintendent of Financial Institutions \*\*  
Ontario Lottery and Gaming Corp c.o.b. OLG Slots at Rideau Carleton Raceway  
Ontario Lottery and Gaming Corporation c.o.b. as Woodbine Racetrack Slots  
Ottawa MacDonald-Cartier Int'l Airport  
Pangnirtung Housing Association  
Parks Canada Agency \*\*  
Pimaksirvik Corporation  
Pompier de Drummondville  
Pond Inlet Housing Association  
Prince George Airport  
Prince Rupert Airport Society  
Pro-Tec Fire Services of Canada (Saskatoon Airport FR)  
Province of New Brunswick - Dept of Education  
Purolator Courier Ltd  
Quebec Port Corp.  
Queen's University  
Qulliq Energy Corporation (formerly known as Nunavut Power Corporation)  
Rankin Inlet Housing Association  
Regina Airport Authority  
Repulse Bay Housing Association  
Royal Canadian Mint \*\*  
Saint John Airport Inc.  
Saint John Port Auth. Saint John, NB  
Saint Paul University  
Salvation Army in Yellowknife

## Member Expense Portal User Guide

---

Salvation Army Ottawa Booth Centre  
Saskatoon Airport Auth. (all employees)  
Sault Ste-Marie Airport Development Corp.  
Senate of Canada - Operational Group \*\*  
Serco Facilities Management Inc.  
Société du Vieux Port de Montréal Inc.  
Sodexo MS Canada Limited  
South Shore Transition House Association  
SSHRC \*\*  
St. John's International Airport Authority  
St. John's Port Auth., St. John's (Nfld)  
St. Thomas University  
St. Thomas University Students' Union  
Staff of the Non-Public Funds  
Statistical Survey Operations \*\*  
Sydney Airport Authority  
Tasiurqit Housing Authority  
The Canada Council  
The City of Moncton  
Thunder Bay International Airport Authority  
Town of Fort Smith  
Town of Hay River  
Town of Moosonee  
Town of Watson Lake  
Treasury Board \*\*  
Treaty Three Police Service  
Trii Choo Alaa (M.V. Louis Cardinal Ferry)  
Tuktoyaktuk Housing Association  
Uncle Gabe's Friendship Centre  
Unitarian Services Committee of Canada  
Université Concordia  
Université de Montréal  
Université de Sherbrooke  
Université du Québec à Chicoutimi  
Université du Québec à Montréal  
Université du Québec à Rimouski  
Université du Québec à Trois-Rivières  
Université du Québec en Outaouais  
Université Laval  
University Children's Centre  
University of New Brunswick  
University of Ontario Institute of Technology  
University of Prince Edward Island  
University of Western Ontario  
University of Winnipeg  
Vancouver International Airport Authority  
Victoria Airport Authority  
Village of Fort Simpson  
Weeneebayko Area Health Authority  
Wequedong Lodge of Thunder Bay  
Whale Cove Hamlet Council

## **Member Expense Portal User Guide**

---

Windsor Airport (Serco Aviation Services)  
Winnipeg Airport Authority  
Yarmouth Airport Commission Association  
Yellowknife Housing Authority  
Yellowknife Public Denominational District Education  
Yukon Arts Centre Corporation  
Yukon College Board of Governors  
Yukon Energy Corporation  
Yukon Hospital Association  
Yukon Women's Transition Home

DRAFT

## 10 Appendix D – List of Screen Shots

Listing of screen shots used throughout the user guide.

### 3. Log On Information

- *Figure 3.1 – PSAC Union Home Page*
- *Figure 3.2 – PSAC Member Login Page*
- *Figure 3.3 – PSAC Create New Account Page*

### 4. Expense Claim Submission

- *Figure 4.1 – Member Info Tab*
- *Figure 4.2 – Direct Deposit Information (Member Info Tab)*
- *Figure 4.3 – Event/Activity Info Tab*
- *Figure 4.4 – Travel Status Tab*
- *Figure 4.5 – Family Care Tab*
- *Figure 4.6 – Salary Entitlement Tab*
- *Figure 4.7 – Expenses Tab*
- *Figure 4.8 – Loss of Salary Tab*
- *Figure 4.9 – Summary Tab*
- *Figure 4.10 – Confirmation Number Prompt*

## 11 Appendix E – Frequently Asked Questions

1. How are supplemental claims handled in the system (ie. when more than one claim is filed against the same event for a given member)? **Response: supplemental claims should be entered using the ‘Adjustment to Prior Claim’ Expense Type**
2. What if I don’t have access to a computer on which to enter my claim? **Response: the goal is to have all members file their expenses electronically by year end 2015. In exceptional circumstances where members are unable to enter their claims online due to accessibility, Event Administrators (the PSAC staff responsible for the event) will assist the member by entering their claim via proxy on the Finance Administrative Portal (FAP). For all other instances where accessibility is not an issue, members will be required to file paper claims with original receipts which will cause delays in payment.**
3. How long are members required to keep their receipts? **Response: receipts must be kept for at least 2 years. If they have the ability to do so, members may choose to keep a scanned copy of their receipts instead of the paper copies. Scanned copies will be accepted by Finance on a go-forward basis for all electronically submitted claims.**
4. What is the process to submit receipts? **Response: The following methods can be used to submit receipts when the online claim is selected for audit:**
  - a. **Scan and attach to online claim to [finance-info-finance@psac-afpc.com](mailto:finance-info-finance@psac-afpc.com)**
  - b. **Fax and include unique Claim ID on receipts to ensure Finance can match to claim filed to (613)560-5547.**
  - c. **Mail in the receipts and include unique Claim ID on receipts to ensure Finance can match to claim filed to 233 Gilmour St, Suite 400, Ottawa, ON, K2P 0P1, Attention: Finance.**
5. Will Regional Offices (RO) still have the ability to write cheques to reimburse the non-LOS portion of expense claims? **Response: This will change under the new online system. ALL expenses will be required to be submitted through this system and therefore be paid by PSAC Headquarters. ROs will only be allowed to issue advances and mark them as such upon the creation of the event in the FAP.**
6. When will the changes to the new policy take effect (ie. AFE)? **Response: the changes will take effect for any event effective September 15<sup>th</sup>, 2014 and beyond.**
7. What will be the process to inform the members of the change in the expense reporting process? **Response: Finance has drafted memos which include information about the MEP and the high level changes to the PSAC Travel Policy. Memos included EFT authorization forms. A user guide for the MEP will also be published and distributed to members as reference. During the initial pilot events, we will ensure that members are walked through the process and will note any questions that are raised by them during these sessions. The User Guide will be**

*modified as required based on the questions raised during these pilot events. Finance will also develop a video tutorial that will be posted on the MEP as a guide for expense claim entry.*

8. Is it possible to enter the full per diem instead of breakfast, lunch, dinner, incidentals separately? ***Response: given that the incidentals are coded under a different account code than breakfast/lunch/dinner, they must be entered separately.***

DRAFT