

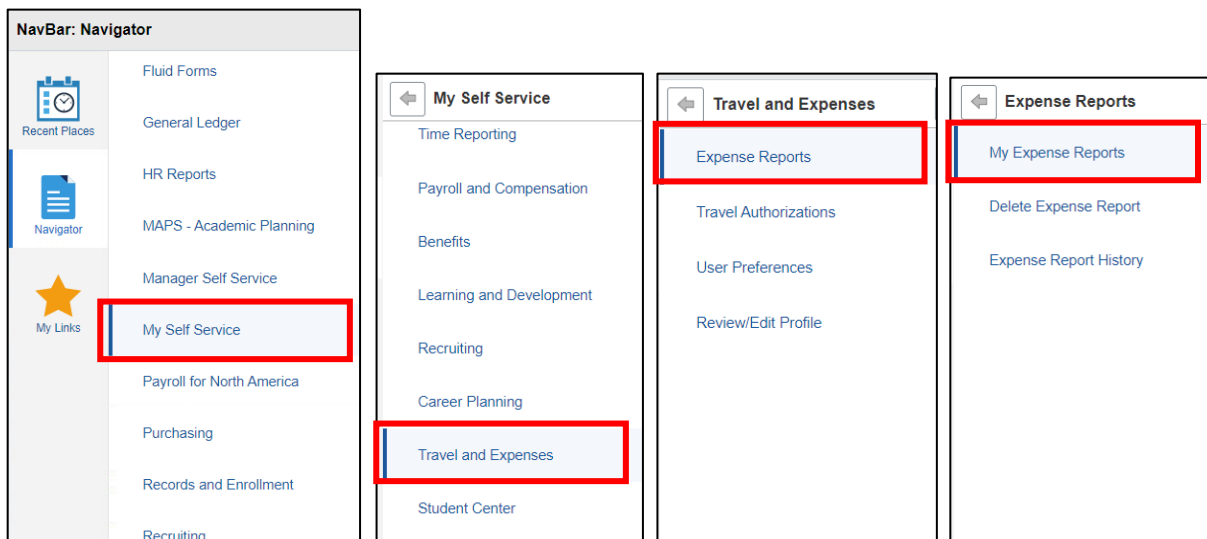
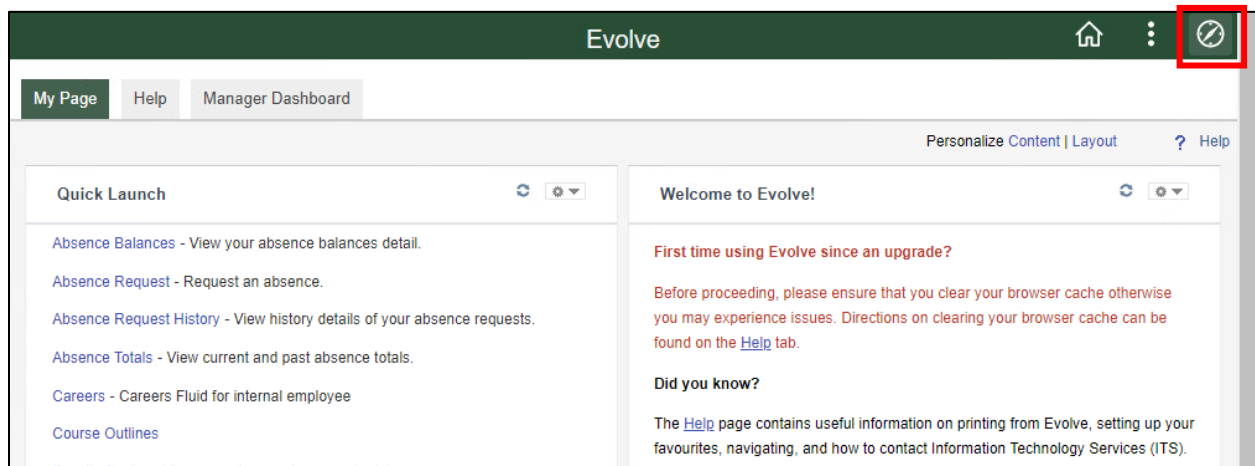
## EXPENSE FORM SUBMISSION INSTRUCTIONS

### Employee Learning & Development – Tuition Reimbursement

Upon successful completion of each semester of study, the **Tuition Reimbursement – Expense Form** and supporting documentation must be submitted via the Expense Module in PeopleSoft.

Approved reimbursement requests will be deposited directly into the same bank account as your regular pay.

1. Navigate to Evolve → My Self-Serve → Travel and Expenses → Expense Reports → My Expense Reports



## 2. Click on “Create Expense Report”

The screenshot shows the 'My Expense Reports' dashboard. On the left, there is a sidebar with a list of report statuses: Returned (0), Not Submitted (0), Awaiting Approval (0), Pending Payment (0), and View All (0). The 'Not Submitted' status is highlighted in green. The main content area shows the 'Not Submitted' status with a message: 'There are currently no Expense Reports with this status.' Below this message is a blue button labeled 'Create Expense Report', which is highlighted with a red rectangular box.


## 3. Complete the information in the following fields:

The screenshot shows the 'Expense Report' form. The form is titled 'Report NEXT' and has a dark header with navigation icons. The form is divided into two main sections: 'General Information' and 'Expense Details'.  
In the 'General Information' section, there are several fields:

- 'Business Purpose' is a dropdown menu set to 'General Travel & Expense'.
- 'Description' is a text input field.
- 'Default Location' is a text input field with a magnifying glass icon.
- 'Reference' is a text input field with a magnifying glass icon.
- 'Attach Receipt' is a button with a receipt icon and a right-pointing arrow.
- 'Accounting Defaults' is a button with a grid icon and a right-pointing arrow.
- 'Creation Date' is '02/27/2023'.
- 'Updated on' is '02/27/2023'.



In the 'Expense Details' section, there is one field:

- 'Expense Report Action' is a dropdown menu.

- **Business Purpose:** Leave as “General Travel & Expense”.
- **Description:** Type “Tuition Reimbursement”.
- **Default Location:** Click on the magnifying glass  and select the campus where you work, or primary location your job is affiliated with.
  1. Sutherland Campus
  2. Frost Campus
  3. Cobourg Campus
  4. Haliburton Campus
- **Expense Report Action:** Use the drop-down menu to select “Add Expense Lines”.

4. Complete the information in the following fields:

The screenshot shows the 'Expense Entry' form for 'Tuition Reimbursement'. The left sidebar shows a summary table with one item: 'Tuition Reimbursement' for 0.00 CAD on Monday, February 27, 2023. The main form area is titled 'Tuition Reimbursement - 02/27/2023' and contains several sections: 'Date' (02/27/2023), 'Expense Type' (Tuition Reimbursement), 'Description' (empty), 'Payment Details' (Payment: Out of Pocket, Amount: 0.00 CAD), 'Additional Information' (Billing Type: Internal, Attach Receipt (Required) - No Receipts, Accounting - 1), and 'Exceptions' (Personal Expense, No Receipt, No VAT Receipt, all set to No).

- **Date:** Click on the calendar  and input today's date.
- **Expense Type:** Click on the magnifying glass  and search for "Tuition Reimbursement".
- **Description:** Include a description of what the reimbursement request is for. Please include information on the semester of study and what course(s) were completed.
- **Payment:** Leave this as "Out of Pocket"
- **Amount:** Include the amount you're requesting to have reimbursed. This amount would have been determined on your Program Application. Employees are eligible to receive a maximum of 50% reimbursement.
- **Attach Receipts:** Your expense report must include the following attachments:
  - A completed "Tuition Reimbursement – Expense Form"

- A fee breakdown issued by the institution
- Proof of payment
- Proof of successful course completion

- **Exceptions:** Leave all as “Off”

5. Click “Review and Submit”

The screenshot shows the 'Expense Entry' form for 'Tuition Reimbursement'. The top navigation bar includes a back arrow, 'Expense Report', 'Expense Entry', and utility icons. The main header shows 'Tuition Reimbursement' with a 'Save' button and a 'Review and Submit' button (highlighted with a red box). Below the header, the total amount is '0.00 CAD'. The form is divided into sections: 'Tuition Reimbursement - 02/27/2023' with fields for Date, Expense Type, and Description; 'Payment Details' with fields for Payment (Out of Pocket), Amount (0.00 CAD), and VAT; and 'Additional Information' with a Billing Type (Internal) dropdown. At the bottom, there is an 'Attach Receipt (Required)' section with a 'No Receipts' warning.

6. Review the summary of your submission. If you need to make changes, click on “Update Details”. If the information looks correct, click “Submit”.

The screenshot shows the 'Expense Summary' page. The top navigation bar includes a back arrow, 'Expense Entry', 'Expense Summary', and utility icons. The main header shows 'Tuition Reimbursement' with an 'Update Details' button and a 'Submit' button (both highlighted with a red box). Below the header, the 'Expense Report Summary' table shows a total of 483.63 CAD and a due amount of 483.63 CAD. The 'Approval Status' section shows a Report ID of 000000903 and a status of 'Pending'. The 'Additional Information' section includes links for 'View Analytics', 'Notes', and 'View Printable Report'.

7. Your expense report has now been submitted and will go through the necessary levels of approval. During the review process, you will receive an email letting you know the outcome.

If your submission requires editing (i.e.: changes to information in the report, additional supporting documentation is needed, etc.), you will receive an email that looks like this:

The following expense report has been sent back for revision:

Employee ID: [REDACTED]  
Employee Name: [REDACTED]  
Submission Date: 2023-02-15  
Report Description: Tuition Reimbursement  
Report ID: [REDACTED]  
Business Purpose: General Travel & Expense  
Total Amount: 483.63 CAD  
Reimbursement Amount: 483.63 CAD

You can navigate directly to the page for more information by clicking the link below:

[https://intranet.flemingc.on.ca/psp/FPPRD/EMPLOYEE/ERP/c/EX\\_ADMIN\\_EXPENSE\\_FLEX\\_EXP\\_SHEET\\_FL.GBL?Page=EX\\_SHEET\\_SUM\\_FL&Action=U&SHEET\\_ID=0000000849&ProcessID=ERApproval&TRANSFER\\_TO\\_EX=S](https://intranet.flemingc.on.ca/psp/FPPRD/EMPLOYEE/ERP/c/EX_ADMIN_EXPENSE_FLEX_EXP_SHEET_FL.GBL?Page=EX_SHEET_SUM_FL&Action=U&SHEET_ID=0000000849&ProcessID=ERApproval&TRANSFER_TO_EX=S)

Follow the link to go back into Evolve, make the necessary updates, and resubmit your expense report. There will be more information in Evolve letting you know why your submission was sent back to you and what edits need to be made.

If your submission is approved, you will receive an email that looks like this:

The following expense report has been approved for payment:

Employee ID: [REDACTED]  
Employee Name: [REDACTED]  
Submission Date: 2023-02-15  
Report Description: Tuition Reimbursement  
Report ID: [REDACTED]  
Business Purpose: General Travel & Expense  
Total Amount: 483.63 CAD  
Reimbursement Amount: 483.63 CAD

You can navigate directly to the page for more information by clicking the link below:

[https://intranet.flemingc.on.ca/psp/FPPRD/EMPLOYEE/ERP/c/EX\\_ADMIN\\_EXPENSE\\_FLEX\\_EXP\\_SHEET\\_FL.GBL?Page=EX\\_SHEET\\_SUM\\_FL&Action=U&SHEET\\_ID=0000000849&ProcessID=ERApproval&TRANSFER\\_TO\\_EX=S](https://intranet.flemingc.on.ca/psp/FPPRD/EMPLOYEE/ERP/c/EX_ADMIN_EXPENSE_FLEX_EXP_SHEET_FL.GBL?Page=EX_SHEET_SUM_FL&Action=U&SHEET_ID=0000000849&ProcessID=ERApproval&TRANSFER_TO_EX=S)

8. When the expense report is paid out, you will receive another email notification with a receipt. Your reimbursement will be deposited into the same bank account as your regular pay.

<b>Name</b>	[REDACTED]		
<b>Employee ID</b>	[REDACTED]		
<b>Payment Amount</b>	483.63 CAD		
<b>Payment Date</b>	February 23, 2023		
<b>Payment Method</b>	EFT		
<b>Bank Name</b>			
<b>Bank Account</b>	*****1234		
<b>Expense Reports</b>	<b>Expense Report ID</b>	<b>Amount</b>	<b>Description</b>
	[REDACTED]	483.63 CAD	Tuition Reimbursement

**The Payment Date listed above reflects the date the payment was transmitted.**

Please reach out to [PD@flemingcollege.ca](mailto:PD@flemingcollege.ca) if you need more information or assistance.