



Alliance de la Fonction publique du Canada
Public Service Alliance of Canada

Member Expense Portal User Guide

Public Service Alliance of Canada

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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 15th, 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 (<https://psacunion.ca/user>). As part of this automation, members can also submit their banking information through the portal 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 from those events; and
- Submit their expense claims for review, approval, and processing in the FAP.

Changes to PSAC Travel Policy

It is important to note that because of the MEP project, some of the provisions within the PSAC Travel Policy were modified to simplify and standardize the business processes around expense claiming as well as to expedite the processing of expense claims in general. These changes have been reflected in greater detail in the PSAC Travel Policy which can be found on the PSAC Member Portal website (<https://psacunion.ca/travel-policy>).

Expense Claim Submission Deadline

Expense claims are to be submitted to PSAC Finance within 90 days of the 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.

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 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.

Family Care Policy (FCP)

Members will be reimbursed the costs for care during the day outside normal work/school/daycare hours following the [Family Care Policy](#).

It should be noted that the underlying 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 their 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 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.

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.

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’.

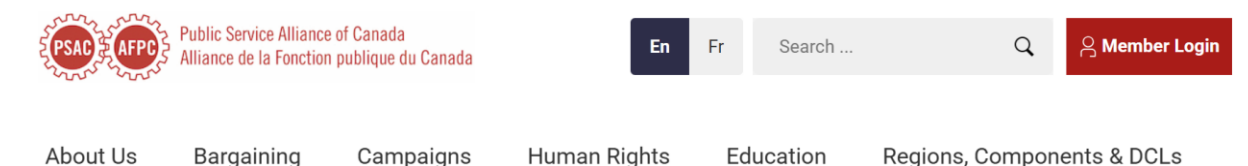


Figure 3.1 – PSAC website Home Page

Step 2 – Enter your email address or Username and Password

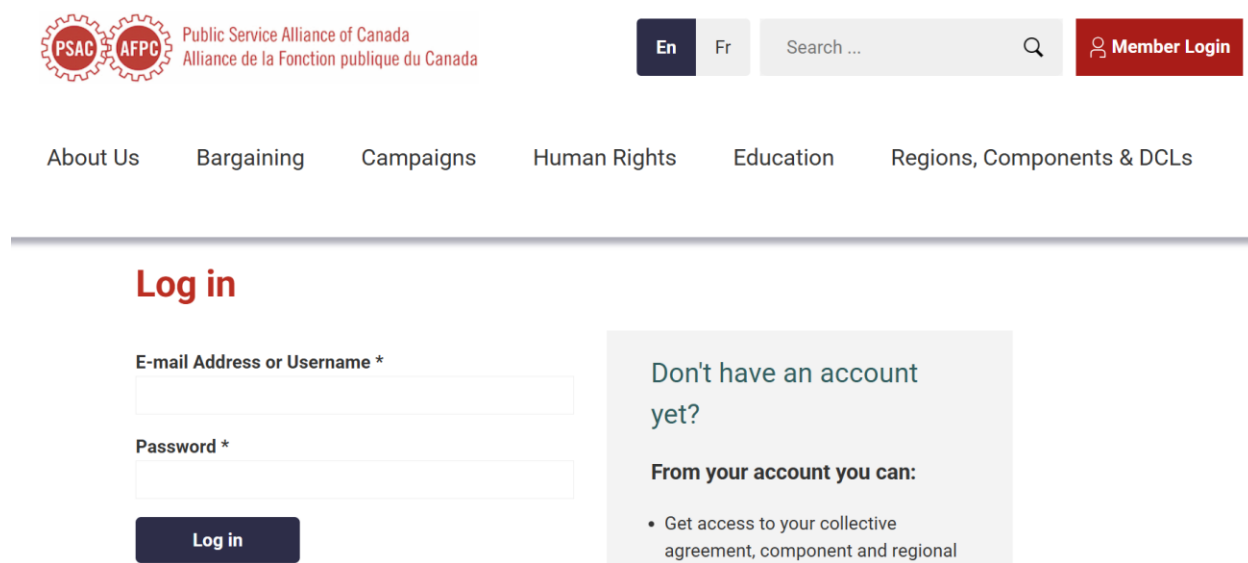


Figure 3.2 – PSAC Member Login Page

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

Create an Account

Step 1: Choose a username and password

Username *

Personal Email Address. *

Please use a personal, non-work related email address. [See our privacy policy.](#)

Password *

Password strength:

Confirm password *

Figure 3.3 – PSAC Create New Account Page

Expense Claim Submission

Submit an Expense Claim >> Member Info

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

Member Expense Portal User Guide

Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info

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

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

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, 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.

Member Expense Portal User Guide

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 for the Direct Deposit setup to be finalized.

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



Transit No.

Institution No.

Account No.

[Edit my profile](#)

Reset

Save / Continue

Figure 4.2 – Direct Deposit Information (Member Info Tab)

Step 4 - Click on “Save/Continue”.

Submit an Expense Claim >> Event/Activity Info

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

Member Expense Portal User Guide

Test.Memberportal

View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info	You have been registered to the following PSAC events/activities. Please select one.
Event/Activity Info	User manual - OTTAWA - 2014-11-17 (11:45 am) - 2014-11-21 (5:00 pm)
Travel Status	Name: User manual
Family Care	Type: EDUCATION Start: 2014-11-17 (11:45 am)
Salary Entitlement	Description: For education End: 2014-11-21 (5:00 pm)
Expenses	Location: OTTAWA
Loss of Salary	
Summary	

Reset Save / Continue

Figure 4.3 – Event/Activity Info Tab

Step 1 – Select the Event/Activity for 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.

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.
 - Province* - Province of the departure location.
- Arrival location

Member Expense Portal User Guide

- 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

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?
 No
 Yes

Event/Activity Info PSAC Policy will cover costs for care outside normal work/school/daycare hours. 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 Caregiver/Agency Phone Number

Expenses Caregiver/Agency Address

Loss of Salary This caregiver is:
 Unlicensed 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 Add

Number of days being claimed 0 Total claimed (\$) 0.00

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.

Reset Save / Continue

Figure 4.5 – Family Care Tab

It should be noted that the underlying FCP intends to assist members 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 their 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 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 of “No” 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 on maximum reimbursable amounts.

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 (e.g., 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 the above information has been provided, click “Save/continue”.

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.

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View Edit Submit an Expense Claim

Member Expense Portal user guide

Member Info	Loss of salary for attending this event/activity will be paid by the PSAC?
Event/Activity Info	<input checked="" type="radio"/> No (paid by my employer)
Travel Status	<input type="radio"/> Yes
Family Care	Social Insurance Number <input type="text"/> Required for income tax.
Salary Entitlement	Employer <input type="text" value="Canada Post Corporation"/>
Expenses	Classification / Level <input type="text" value="A05 - ADMINISTRATIVE"/>
Loss of Salary	Step <input type="text" value="--Select--"/>
Summary	Department <input type="text" value="If required by your collective agreement, please enter your step, department, zone and seasonal."/>
	Zone <input type="text" value="If required by your collective agreement, please enter your step, department, zone and seasonal."/>
	Seasonal <input type="text" value="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 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 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:

Member Expense Portal User Guide

- 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.
- 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.

Submit an Expense Claim >> Expenses

The Expenses tab is used to enter the various expenses for each member from 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

Member Info

Event/Activity Info

Travel Status

Family Care

Salary Entitlement

Expenses

Loss of Salary

Summary

To claim an expense, fill out the fields below, then click the *Add expense to claim* button.

Province
-- Select --

Type
-- Select --

Date From
2014-11-03

Date To
2014-11-14

Subtype
Please choose an expense type.

Rate

Qty
12

Total
0.00

Add expense to claim

Expense Details

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

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, 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

Member Expense Portal User Guide

Note: 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: 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

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- 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' and '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.

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- **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.

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.

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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 *Add salary-loss to claim* button.

Event/Activity Info Type Regular Date From 2014-11-03 Date To 2014-11-07

Travel Status

Family Care Unit Hourly Hours per day Rate 24.52 Total per unit 0.00 Add salary-loss to claim

Salary Entitlement

Expenses

Loss of Salary

Summary

Salary Details

Date From	Date To	Type	Details	Unit	Quantity	Rate	Total	
2014-11-03	2014-11-03	Regular		Hourly	7.5	\$24.52	\$183.90	Remove
2014-11-04	2014-11-04	Regular		Hourly	7.5	\$24.52	\$183.90	Remove
2014-11-05	2014-11-05	Regular		Hourly	7.5	\$24.52	\$183.90	Remove
2014-11-06	2014-11-06	Regular		Hourly	7.5	\$24.52	\$183.90	Remove
2014-11-07	2014-11-07	Regular		Hourly	7.5	\$24.52	\$183.90	Remove

Reset Save / Continue

Figure 4.8 – Loss of Salary Tab

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 Unit¹: The following Salary Types are available for selection.
 - Regular
 - Hourly

¹ If the salary agreement is not available in the system for the selected employer, only the 'Hourly' option will be available for selection.

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- 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
- Miscellaneous² (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

² Used for second employer, or other unspecified loss of benefits.

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- 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.
- 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 a 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.

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 (i.e., void cheque) and Family Care (e.g., 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	Member Information
Event/Activity Info	PSAC ID 928792
Travel Status	Employer Canada Post Corporation
Family Care	Classification A05 ADMINISTRATIVE
Salary Entitlement	
Expenses	
Loss of Salary	
Summary	Event Information

Name: Claude event

Type: EDUCATION Start: 2014-11-03 (9:00 am)

Description: Claude event End: 2014-11-14 (5:00 pm)

Location: anywhere

Expense Information

Meals	\$78.75
Expenses Total	\$78.75
Cash Advance	(\$100.00)
Net Expenses	\$-21.25

Attachments

Supporting Documentation is required for this claim. Please provide scans of your receipts and/or void cheque for submission with your claim.

I would prefer to provide my supporting documentation by fax or email
Please note: Your claim will not be processed until all supporting documentation is received. Please include a copy of your claim summary with your supporting documentation.

Direct Deposit (copy of void cheque) *

No file chosen

You may upload a jpeg, tiff, png, or gif image.

Administrator Information

Name
Event Administrator2
Email
gourl@psac-afpc.com
Phone

Figure 4.9 – Summary Tab

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.

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✓ 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

Expense Claim History and Audits

- 1- After your claim has been submitted and you have received the confirmation number, you can track the evolution of your claim under the “My Claims” tab
- 2- 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, an email is sent to your home email address to advise you. 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 few ways to Finance:

- Scan: under My Claims tab using the [Add Supporting Documents*](#) link or button.
- Email finance-info-finance@psac-afpc.com

Need Help?

- 1) Contact the Event Administrator (EA) responsible for the event for which you are submitting a claiming.

or

- 2) Email finance-info-finance@psac-afpc.com

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Appendix A – Glossary

Abbreviations

APP – Approver

EA – Event Administrator

FAP – Finance Administrative Portal

FCP – Family Care Policy

MEP – Member Expense Portal

Appendix B – List of Screen Shots

Listing of screen shots used throughout the user guide.

3. Log On Information

- Figure 3.1 – PSAC website 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

Appendix C – Frequently Asked Questions

1. How are supplemental claims handled in the system (e.g., when more than one claim is filed for 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: 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. This approach 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 can 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 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; or
- b. Email to finance-info-finance@psac-afpc.com.

5. Will Regional Offices (RO) still have the ability to write cheques to reimburse the non-loss of salary portion of expense claims?

Response: No. 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. Is it possible to enter the full per diem instead of breakfast, lunch, dinner, and incidentals separately?

Response: Given that the incidentals are coded under a different account code than breakfast/lunch/dinner, they must be entered separately.