Reimbursement Job Aid

1. Save all receipts. Gather them all when seeking reimbursement.

Go to:

https://www.umassp.edu/uits/product-catalog Scroll down to click on Finance System

Click on President's Office and Boston Login

Finance S	ystem				
= In This Section UITS Home Product Catalog	Provides access to financial transactions and reporting. Due to incremental security upgrades, the President's Office and Boston campus will now login us				
Services Security Support About	President's Office and Boston Login Original IDM Login				

2. Employee Self Service



- 3. Expense Reports
- 4. Create/Modify should be highlighted
- 5. Click on Add a New Value (confirm it is your employee #)

Financials	
Expense Reports	Expense Report
Create/Modify	Find an Existing Value Add a New Value
View	Empl ID
Print	
Delete	Add
Cash Advances ~	Find an Existing Value Add a New Value

- 6. Business Purpose
- 7. Report Description
- 8. Terra Dotta ID if this is a travel reimbursement

9. Enter Date, Expense Type, Description, Payment Type, Amount (if foreign, put in exchange rate below), Billing Type

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View	Alan Abend				Quic	k StartPopulate From
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Delete	Terra Dotta ID]			
Cash Advances	~			GSA Per Diem Rates		
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10. If same speed type for all expenses, go to Actions/Default Accounting for Report. Enter Speed Type (OK autofills rest of info, removes speed type on the report)

	Actions	Choose an Action	0	GO	
11. Save for Later					



- 12. + for new expense lines and repeat #10, speed type will follow from #11
- 13. Save for Later
- 14. Attachments (attached all scanned receipts and Terra Dotta receipt if travel report)

GSA Per Diem Rates Attachments

- 15. Save for Later
- 16. Once all the expense lines are fill out and receipts are attached, Alan Abend will review the report and get the approval signatures and submit the report. Please email Alan that you have an expense report in your queue.