How to Create a Claim in PeopleSoft

Sign in to PeopleSoft from our Pharmacy Home Page (pharm.ualberta.ca) under Faculty and Staff Resources

Then select Login to PeopleSoft with your ccid and password
Select the Travel and Expense Center to navigate to this console

Click the Create link
Create Expense Report

Select a Template

Choose your template

Choose your expense types (Optional)
Click “OK”
Select the expense types you wish to claim. Other options may be available once you begin, so don’t be concerned at this point.

Complete your claim with all pertinent details as seen in this example below.
Enter a speed code here. Click “OK”

If the expense is to be split between multiple projects, use the “Add Chartfield Line” button.

Be sure to have destination and dates for travel. If for non-travel expenses, type “Expense Reimb” and the date(s)

Be sure to indicate details such as the name of the conference, type of research activities, names of collaborators, purpose of travel or expense, etc.

This field is not necessary

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Enter a speed code! (Mandatory)!
Click if you had a Travel Advance.

Review the claim for completeness and then click ‘Save’.
You must click “ok” to complete the process!

*Return your printed Detailed Report and all original receipts to the appropriate Admin Office for processing. Trust Accounts to Matthew, Operating Accounts to Doris.