



PeopleSoft 9.2 Travel & Expense

Erin Fitzgerald
Tiffany Barker Cook



Agenda

- Policies
 - Reminders
- Travel Authorization
- Travel Cash Advance
- Expense Reports
- User Settings
 - Direct Deposit
- Submission Process
 - Self-Service Customers
 - Full-Service Customers
- T&E Approval
- Review Chartstrings
- Review Payments

Policies

- Travel
 - Last updated January 2014 (currently up for revision)
- Business Meal, Hospitality and Amenity
 - Last updated January 2014 (up for revision in the near future)
- Automobile Rental Operating Procedure
 - Last updated January 2019

Reminders

- No pre-trip expenses
- Submitted within 60 calendar days
 - 30 days for travel cash advances
- Eligible Travelers
- Documentation
 - Itemized receipts are required
 - Except travel meals
 - Travel log for developing countries
- Travel Meals
 - Overnight Stay
 - Domestic: Max \$60/day actual expenses
 - International:
 - Max \$75/day actual expenses
 - Max \$90/day with receipts
- Business Meals
 - Business Purpose
 - Attendees
- Airfare
 - “basic economy” & economy/main cabin”
 - Fly America Act (see SPA)
- Incidentals - \$10/day
 - Gratuities
 - Housekeeping \$2-\$3/night
 - Bellhop \$1-\$2/bag
- Personal Expenses
- No Alcohol

“If a receipt is lost, misplaced, or damaged beyond legibility, the traveler is responsible for contacting the vendor and requesting a copy of the receipt. This applies regardless of method of purchase, i.e., cash, purchasing card, personal credit card, etc.”

International Travel

- Travel Authorization
 - Required for international travel (outside US and Canada)
- International SOS
- Currency conversion
 - < 7days – Once
 - > 7 days – Start of each new week
- Prepay expenses
- Travel log ([International Travel web page](#))

Travel Authorization

- Encumbrance
- Travel Cash Advance requirement
- Risk Management requirement (International)
- Completed in PeopleSoft (Self-Service customers)
 - Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorization > Create/Modify
- Required information
 - Business purpose
 - Begin/end trip dates
 - Destination
 - Valid chartstring

Menu [Refresh] [Settings]

- My Favorites
- * UVM Interfaces
- * UVM Modifications
- * UVM Reports
- * UVM System
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Customer Contracts
- Suppliers
- Purchasing
- eProcurement
- Services Procurement
- Grants
- Program Management
- Project Costing
- Lease Administration
- T&E Administration
- Travel Administration
- Billing
- Accounts Receivable
- Accounts Payable
- Financial Gateway
- Commitment Control
- General Ledger
- Real Time Bottom Line
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
- Tax Center
- Treasury Dashboards
- My Preferences
- My Dictionary
- My Feeds

9.2 Travel Authorization Create/Modify (Details)

Modify Travel Authorization

Save for Later | Summary and Submit

Tiffany Barker Cook

Actions

Authorization ID 0000009002 Pending

*Business Purpose

*US State/Country

*Description

*Begin Trip Date *End Trip Date

Comments

Attachments (1)

Projected Expenses

Add: Quick-Fill

Totals (1 Line) 400.00 USD

	*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	
	<input type="text" value="09/30/2018"/>	<input type="text" value="Encumbrance-Foreign Trip"/>	<input type="text" value="Meals for HEUG"/>	<input type="text" value="Personal Credit Card"/>	<input type="text" value="400.00"/>	USD	

*Billing Type

Accounting Details

Totals (1 Line) 400.00 USD

9.2 Travel Authorization

Create/Modify (Summary and Submit)

Modify Travel Authorization

Save for Later | Travel Authorization Details

Tiffany Barker Cook

Actions ...Choose an Action GO

*Business Purpose Professional Development

*US State/Country Italy

Authorization ID 0000009002 Pending

*Description HEUG Conference

*Begin Trip Date 09/30/2018 *End Trip Date 10/03/2018

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Totals

View Printable Version

Notes

Attachments (1)

Projected Expenses (1 Line) 400.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 400.00 USD

I certify that the information provided above is an accurate estimate of travel-related costs that are to be incurred by me.

Submit Travel Authorization

9.2 Travel Authorization View (Refresh Approval)

Travel Authorization

 [Travel Authorization Details](#)

Tiffany Barker Cook

Actions

Your travel authorization 000009002 has been submitted for approval.

Business Purpose Professional Development

*US State/Country Italy

Authorization ID 000009002 Submission in Process

Description HEUG Conference

Begin Trip Date 09/30/2018 End Trip Date 10/03/2018

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Totals 

 [View Printable Version](#)

 [Notes](#)

 [Attachments \(1\)](#)

Projected Expenses (1 Line) 400.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 400.00 USD

I certify that the information provided above is an accurate estimate of travel-related costs that are to be incurred by me.

Submitted On 09/12/2018

Submitted By Tiffany Barker Cook

 [Return to Search](#)

 [Notify](#)

9.2 Travel Authorization View (Withdraw)

Travel Authorization

[Travel Authorization Details](#)

Tiffany Barker Cook

Actions ...Choose an Action GO

Business Purpose Professional Development

*US State/Country Italy

Authorization ID 0000009002 Submitted for Approval

Description HEUG Conference

Begin Trip Date 09/30/2018 End Trip Date 10/03/2018

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Totals

View Printable Version

Notes

Attachments (1)

Projected Expenses (1 Line) 400.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 400.00 USD

I certify that the information provided above is an accurate estimate of travel-related costs that are to be incurred by me.

Submit Travel Authorization

Withdraw Travel Authorization

Submitted On 09/12/2018

Submitted By Tiffany Barker Cook

Approval History

Submitted
Tiffany Barker Cook

Expense Manager
(Pooled)

Action	Role	Name	Date/Time
Submitted	Employee	Tiffany Barker Cook	09/12/2018 2:30:50PM

Travel Cash Advance

- No pre-trip expenses
- Completed in PeopleSoft (Self-Service customers)
 - Main Menu > Employee Self-Service > Travel and Expenses > Cash Advance > Create/Modify
- Cash or direct deposit
- Required Information
 - Travel authorization number
 - Business purpose
 - Location
 - Begin/end trip date
- 5 business days before trip



The University of Vermont

FSDEV - refreshed to Apr 30, 2018 0358AM from fsprd

PeopleSoft Finance 9.2

Welcome to UVM, Tiffany Barker Cook

All Search >> Advanced Search

Personalize Content | Layout ? Help

Menu

- > My Favorites
- > * UVM Interfaces
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- > Accounts Receivable
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- > Real Time Bottom Line
- > Set Up Financials/Supply Chain
- > Enterprise Components
- > Worklist
- > Tree Manager
- > Reporting Tools
- > PeopleTools
- > Tax Center
- > Treasury Dashboards
- > My Preferences
- > My Dictionary
- > My Feeds

9.2 Cash Advance Create/Modify

Modify Cash Advance

 Save for Later

Tiffany Barker Cook

*Business Purpose Professional Development

*Advance Description HEUG Conference

*Begin Trip Date 09/30/2018

*End Trip Date 10/03/2018

Report 0000005881 Pending

Travel Auth # 8804

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

 User Defaults

 Import ATM Advances

Cash Advance 

 View Printable Version

 Notes

 Attachments

*Source	Description	*Amount	Currency	Apply Tax		
Direct Deposit ACH	Cash for meals	400.00	USD	<input type="checkbox"/>		
▼ Totals						
Advance Amount		400.00	USD			

I certify that the advance requested above will be used for authorized purposes only.

Submit Cash Advance

9.2 Cash Advance View (Refresh Approval)

View Cash Advance

Tiffany Barker Cook

Business Purpose Professional Development

Advance Description HEUG Conference

*Begin Trip Date 09/30/2018

*End Trip Date 10/03/2018

Report 000005881 Submission in Process

Travel Auth # 8804

Post State Not Applied

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

User Defaults

Accounting Date 09/12/2018

Cash Advance ?

View Printable Version

Notes

*Source	Description	*Amount	Currency	Apply Tax
Direct Deposit ACH	Cash for meals	400.00	USD	<input type="checkbox"/>
Totals				
	Advance Amount	400.00	USD	

I certify that the advance requested above will be used for authorized purposes only.

Submit Cash Advance

Submitted On 09/12/2018

Submitted By Tiffany Barker Cook

Refresh Approval Status

9.2 Cash Advance View (Withdraw)

View Cash Advance

Tiffany Barker Cook

Business Purpose Professional Development

Advance Description HEUG Conference

*Begin Trip Date 09/30/2018

*End Trip Date 10/03/2018

Report 0000005881 Submitted for Approval

Travel Auth # 8804

Post State Not Applied

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

User Defaults

Accounting Date 09/12/2018

Cash Advance ?

View Printable Version

Notes

*Source	Description	*Amount	Currency	Apply Tax
Direct Deposit ACH	Cash for meals	400.00	USD	<input type="checkbox"/>

Totals				
Advance Amount	400.00	USD		

I certify that the advance requested above will be used for authorized purposes only.

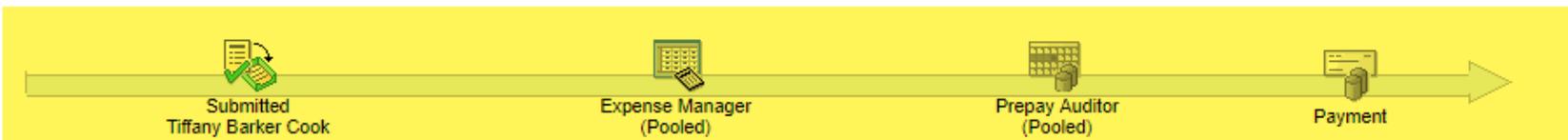
Submit Cash Advance

Withdraw Cash Advance

Submitted On 09/12/2018

Submitted By Tiffany Barker Cook

Approval History



Expense Report

- Completed in PeopleSoft (*Self-service customers*)
 - Main Menu > Employee Self-Service > Travel and Expenses > Expense Report > Create/Modify
 - Required information
 - Documentation (per policy)
 - Employee signature (delegate entry)
 - Apply/associate travel authorization and travel cash advance
- Approval based on department
 - Reassign reports for supervisor

- * UVM Interfaces
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- Travel Administration
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- My Preferences
- Tax Center
- Treasury Dashboards

JP - refreshed to Aug 09, 2018 0406AM from fsprd

Welcome to UVM, Tiffany Barker Cook

All Search Advanced Search Last Search Results

Personalize Content | Layout ? Help

9.2 Expense Report Create/Modify (Create vs Modify)

Create Expense Report

 Save for Later |  Summary and Submit

Tiffany Barker Cook 

*Business Purpose

*Report Description

*Trip Description/Dates/Comments


*US State/ Country

 Attachments

Actions

Modify Expense Report

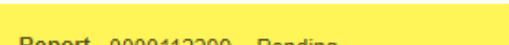
 Save for Later |  Summary and Submit

Tiffany Barker Cook 

*Business Purpose

*Report Description

*Trip Description/Dates/Comments


Report 0000112299 Pending

*US State/ Country

Authorization ID 0000009002

 Attachments

Actions

9.2 Expense Report Create/Modify (Actions)

Create Expense Report

Save for Later | Summary and Submit

Tiffany Barker Cook

*Business Purpose

*Report Description

*Trip Description/Dates/Comments

*US State/ Country

Attachments

Quick Start

- ...Populate From
- ...Populate From
- A Template
- A Travel Authorization
- An Existing Report
- Entries from My Wallet

Modify Expense Report

Save for Later | Summary and Submit

Tiffany Barker Cook

*Business Purpose

*Report Description

*Trip Description/Dates/Comments

Report 0000112299 Pending

*US State/ Country

Authorization ID 0000009002

Attachments

Actions

- ...Choose an Action
- ...Choose an Action
- Adjustment Cash Advance
- Apply/View Cash Advance(s)
- Copy Expense Lines
- Default Accounting For Report
- Expense Report Project Summary
- Export to Excel
- User Defaults

9.2 Expense Report Create/Modify (Details)

Modify Expense Report

Tiffany Barker Cook [?](#)

[Save for Later](#) | [Summary and Submit](#)

*Business Purpose

Report 0000112299 Pending

Actions

*Report Description

*US State/ Country

Authorization ID 0000009002

[Attachments](#)

*Trip Description/Dates/Comments

Expenses [?](#)

[Expand All](#) | [Collapse All](#)

Add: [My Wallet \(0\)](#) | [Quick-Fill](#)

Total 800.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
<input type="text" value="08/01/2018"/>	<input type="text" value="Meals - Business"/>	<input type="text" value="Dinner with colleagues"/> 232 characters remaining Receipt Split Attendees	<input type="text" value="Personal Credit Card"/>	<input type="text" value="100.00"/>	<input type="text" value="USD"/>
*Billing Type <input type="text" value="UVM Intern"/> *Location <input type="text" value="Italy"/> *Merchant <input type="radio"/> Preferred <input checked="" type="radio"/> Non-Preferred <input type="text" value="Fancy, but not too fancy"/>		<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable <input type="checkbox"/> No Receipt	*Exchange Rate <input type="text" value="1.00000000"/> Base Currency Amount <input type="text" value="100.00"/> USD		
Accounting Details ?					

<input type="text" value="08/01/2018"/>	<input type="text" value="Air Travel Foreign"/>	<input type="text" value="Airfare BTV to Italy"/> 234 characters remaining	<input type="text" value="Personal Credit Card"/>	<input type="text" value="300.00"/>	<input type="text" value="USD"/>
<input type="text" value="08/01/2018"/>	<input type="text" value="Hotel/Lodging Domestic"/>	<input type="text" value="Hotel Wizard: Hotel/Lodging Domestic"/> 218 characters remaining	<input type="text" value="Personal Credit Card"/>	<input type="text" value="100.00"/>	<input type="text" value="USD"/>
<input type="text" value="08/02/2018"/>	<input type="text" value="Hotel/Lodging Domestic"/>	<input type="text" value="Hotel Wizard: Hotel/Lodging Domestic"/> 218 characters remaining	<input type="text" value="Personal Credit Card"/>	<input type="text" value="100.00"/>	<input type="text" value="USD"/>

9.2 Expense Report

Create/Modify (Summary and Submit)

Modify Expense Report

[Save for Later](#) | [Expense Details](#)

Tiffany Barker Cook

Actions

*Business Purpose

Report 0000112299 Pending

*Description

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Post State Not Applied

US State/Country Italy

Totals [?](#)

[View Printable Version](#)

[View Analytics](#)

[Notes](#)

[Attachments](#)

Employee Expenses (6 Lines)	800.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	250.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee 550.00 USD

Amount Due to Supplier 0.00 USD

I certify that the information provided above is true and correct, that there are no alcohol expenses in / with any travel meals, and I did not pay for nor seek reimbursement for this expense by any other method. I certify that any international airfare was purchased in compliance with the Fly America Act. Reimbursement of / payment for items requires them to become property of UVM.

9.2 Expense Report Create/Modify (Summary and Submit Actions)

Modify Expense Report

Save for Later | Expense Details

Tiffany Barker Cook

*Business Purpose

*Description

Report 0000112299 Pending

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Post State Not Applied

US State/Country Italy

Actions

- ... Choose an Action
- Adjustment Cash Advance
- Apply/View Cash Advance(s)
- Expense Report Project Summary
- Export to Excel
- User Defaults

Attachments

Totals

View Printable Version

View Analytics

Notes

Employee Expenses (6 Lines) 800.00 USD

Non-Reimbursable Expenses 0.00 USD

Employee Credits 0.00 USD

Cash Advances Applied 250.00 USD

Prepaid Expenses 0.00 USD

Supplier Credits 0.00 USD

Amount Due to Employee 550.00 USD

Amount Due to Supplier 0.00 USD

I certify that the information provided above is true and correct, that there are no alcohol expenses in / with any travel meals, and I did not pay for nor seek reimbursement for this expense by any other method. I certify that any international airfare was purchased in compliance with the Fly America Act. Reimbursement of / payment for items requires them to become property of UVM.

9.2 Expense Report View (Refresh Approval)

View Expense Report

 Expense Details

Tiffany Barker Cook

Actions

Your expense report 0000112299 has been submitted for approval.

Business Purpose Professional Development

Report 0000112299 Submission in Process

Description HEUG Conference

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Post State Not Applied

US State/Country Italy

Totals 

 View Printable Version

 View Analytics

 Notes

Employee Expenses (6 Lines)	800.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	250.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee 550.00 USD

Amount Due to Supplier 0.00 USD



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Submitted On 09/12/2018 Submitted By Tiffany Barker Cook

9.2 Expense Report View (Withdraw)

View Expense Report

Expense Details

Tiffany Barker Cook

Actions

Business Purpose Professional Development

Report 0000112299 Submitted for Approval

Description HEUG Conference

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Post State Not Applied

US State/Country Italy

Totals

View Printable Version

View Analytics

Notes

Employee Expenses (6 Lines)	800.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	250.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee 550.00 USD

Amount Due to Supplier 0.00 USD

I certify that the information provided above is true and correct, that there are no alcohol expenses in / with any travel meals, and I did not pay for nor seek reimbursement for this expense by any other method. I certify that any international airfare was purchased in compliance with the Fly America Act. Reimbursement of / payment for items requires them to become property of UVM.

Submitted On 09/12/2018

Submitted By Tiffany Barker Cook

▼ Approval History

Submitted
Tiffany Barker Cook

Expense Manager
(Pooled)

Prepay Auditor
(Pooled)

Payment

9.2 Expense Report View (Withdraw/Refresh Approval)

View Expense Report

 Expense Details

Tiffany Barker Cook

Actions

Your expense report 0000112299 has been withdrawn from the approver's queue.

Business Purpose Professional Development

Report 0000112299 Submitted for Approval

Description HEUG Conference

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Post State Not Applied

US State/Country Italy

Totals 

 View Printable Version

 View Analytics

 Notes

Employee Expenses (6 Lines) 800.00 USD

Non-Reimbursable Expenses 0.00 USD

Employee Credits 0.00 USD

Cash Advances Applied 250.00 USD

Prepaid Expenses 0.00 USD

Supplier Credits 0.00 USD

Amount Due to Employee 550.00 USD

Amount Due to Supplier 0.00 USD

I certify that the information provided above is true and correct, that there are no alcohol expenses in / with any travel meals, and I did not pay for nor seek reimbursement for this expense by any other method. I certify that any international airfare was purchased in compliance with the Fly America Act. Reimbursement of / payment for items requires them to become property of UVM.

9.2 Expense Report View (Actions)

View Expense Report

 Expense Details

Tiffany Barker Cook

Your expense report 0000112299 has been submitted for approval.

Business Purpose Professional Development

Description HEUG Conference

Report 0000112299 Submission in Process

Created 09/12/2018 Tiffany Barker Cook

Last Updated 09/12/2018 Tiffany Barker Cook

Post State Not Applied

US State/Country Italy

Totals 

 View Printable Version

 View Analytics

 Notes

Actions

- ...Choose an Action
- ...Choose an Action
- Expense Report Project Summary
- Export to Excel
- View Cash Advance

GO

Employee Expenses (6 Lines)	800.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	250.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee 550.00 USD

Amount Due to Supplier 0.00 USD

I certify that the information provided above is true and correct, that there are no alcohol expenses in / with any travel meals, and I did not pay for nor seek reimbursement for this expense by any other method. I certify that any international airfare was purchased in compliance with the Fly America Act. Reimbursement of / payment for items requires them to become property of UVM.

Submit Expense Report

Submitted On 09/12/2018 Submitted By Tiffany Barker Cook

Refresh Approval Status

 Return to Search

 Notify

9.2 Expense Report Export to Excel

Export to Excel

Expense Report

Report 0000100884

To export to Excel, press the spreadsheet icon. You can adjust the layout via the Personalize link.

Personalize | Find |  |  | First  1-5 of 5  Last

Expense Date	Expense Type	Description	Amount Spent	Currency	Payment Type	Description
02/26/2017	Air Travel Domestic	Air Travel Domestic	25.00	USD	Personal Credit Card	Personal Credit Card
02/27/2017	Meals- Domestic Travel Daily	Meals- Domestic Travel Daily	12.80	USD	Cash	Cash
03/02/2017	Meals- Domestic Travel Daily	Meals- Domestic Travel Daily	6.14	USD	Cash	Cash
03/02/2017	Gratuity-Domestic	Gratuity-Domestic	10.00	USD	Cash	Cash
03/02/2017	Gratuity-Domestic	Gratuity-Domestic	3.00	USD	Cash	Cash

[Return](#)



ps (8).xls [Protected View] - Excel

File Home Insert Page Layout Formulas Data Review View ACROBAT Tell me what you want to do...

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.

A1 Expense Date

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Expense Date	Expense Type	Description	Amount Spent	Currency	Payment Type	Description	Billing Type	Description	Description	Non-Reimb	No Receipt	Location	Originating Location
2	8/1/2018	Meals - Business	Meals - Business	100	USD	Personal Credit Card	Personal Credit Card	UVM Internal	UVM Internal	Dinner with colleagues	N	N	Italy	
3	8/1/2018	Air Travel Foreign	Air Travel Foreign	300	USD	Personal Credit Card	Personal Credit Card	UVM Internal	UVM Internal	Airfare BTV to Italy	N	N		
4	8/1/2018	Hotel/Lodging Domestic	Hotel/Lodging Domestic	100	USD	Personal Credit Card	Personal Credit Card	UVM Internal	UVM Internal	Hotel Wizard: Hotel/Lodging Domestic	N	N	Italy	
5	8/2/2018	Hotel/Lodging Domestic	Hotel/Lodging Domestic	100	USD	Personal Credit Card	Personal Credit Card	UVM Internal	UVM Internal	Hotel Wizard: Hotel/Lodging Domestic	N	N	Italy	
6	8/3/2018	Hotel/Lodging Domestic	Hotel/Lodging Domestic	100	USD	Personal Credit Card	Personal Credit Card	UVM Internal	UVM Internal	Hotel Wizard: Hotel/Lodging Domestic	N	N	Italy	
7	8/4/2018	Hotel/Lodging Domestic	Hotel/Lodging Domestic	100	USD	Personal Credit Card	Personal Credit Card	UVM Internal	UVM Internal	Hotel Wizard: Hotel/Lodging Domestic	N	N	Italy	
8														

ps (8).xls [Protected View] - Excel

Review View ACROBAT Tell me what you want to do... Tiffany Ba

viruses. Unless you need to edit, it's safer to stay in Protected View.

O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD
Preferred Merchant	Non-Preferred Merchant	Ticket Number	Nbr of Nights	Transportation ID	Miles	Rate	Passengers	Originating Location	Amount Spent	Currency	Exchange Rate	Dflt	Reimburse Amt	Currency	
	Fancy, but not too fancy								100	USD		1 Y	100	USD	
	United	12354654							300	USD		1 Y	300	USD	
Hilton			1						100	USD		1 Y	100	USD	
Hilton			1						100	USD		1 Y	100	USD	
Hilton			1						100	USD		1 Y	100	USD	
Hilton			1						100	USD		1 Y	100	USD	

9.2 Expense Report Copy From an Existing

Favorites ▾ | Main Menu ▾ > Employee Self-Service ▾ > Travel and Expenses ▾ > Expense Reports ▾ > Create/Modify

Home | Worklist | Process Monitor | Report Manager | Add to Favorites | Sign out



The University of Vermont
PeopleSoft Finance 9.2

FSUPG - refreshed to Mar 06, 2018 03:57 AM from FSPRD

Welcome to UVM, Erin Fitzgerald

All ▾ Search >> Advanced Search

Print | New Window | Help | Personalize Page |

Create Expense Report

Save for Later | Home | Summary and Subr

Erin Fitzgerald

*Business Purpose ▾

*Report Description

*US State/ Country

Attachments

Quick Start

- ...Populate From
- A Template
- A Travel Authorization
- An Existing Report
- Entries from My Wallet

GO

Copy from Existing Expense Report

From Date 

To 

Expense Reports

	Report ID	Description	Business Purpose	Status	Created
<input type="button" value="Select"/>	0000108305	Mileage to campus for meetings	Administration/Operation	Pending	03/19/2018
<input type="button" value="Select"/>	0000105832	Mileage to campus for meetings	Administration/Operation	Paid	10/28/2017
<input type="button" value="Select"/>	0000105805	Mileage to campus for meetings	Administration/Operation	Paid	10/27/2017
<input type="button" value="Select"/>	0000100884	2017 HEUG Las Vegas	Administration/Operation	Paid	03/10/2017

Create Expense Report

Erin Fitzgerald ?

Actions

*Business Purpose

*US State/ Country

*Report Description

Attachments

***Trip Description/Dates/Comments**

Expenses ?

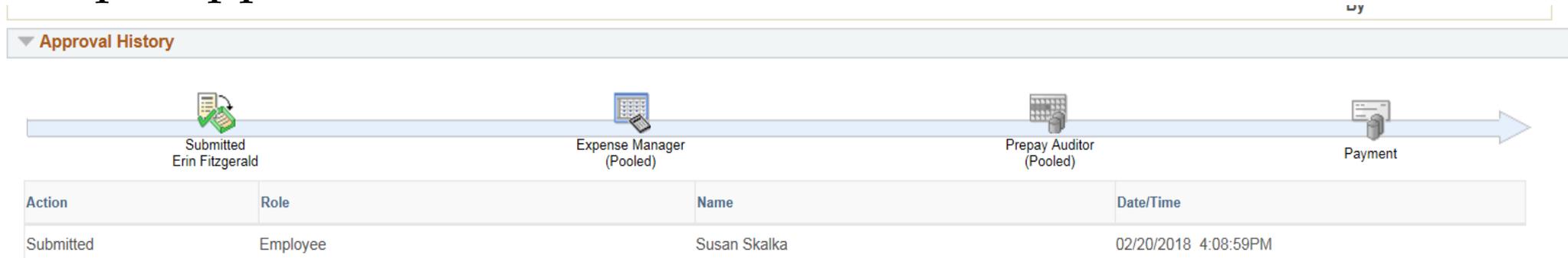
Expand All | Collapse All Add: My Wallet (0) | Quick-Fill

Total 56.94 USD

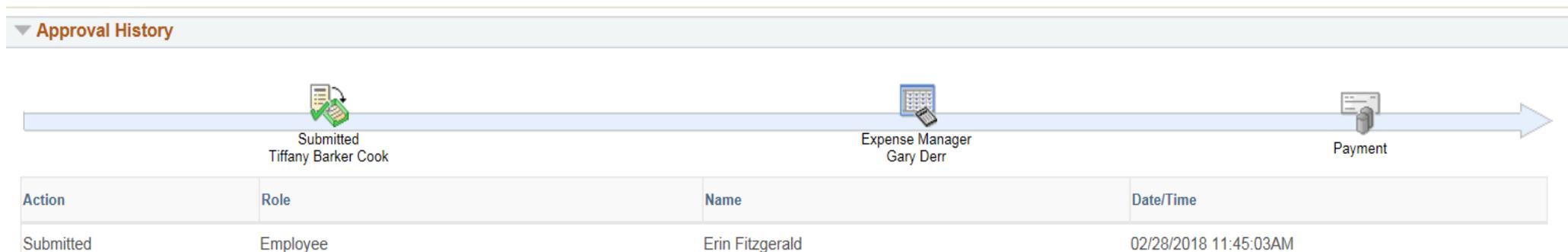
*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency	
<input type="text" value="02/26/2017"/>	<input type="text" value="Air Travel Domestic"/>	<input type="text" value="baggage fee"/> 243 characters remaining	<input type="text" value="Personal Credit Card"/>	<input type="text" value="25.00"/>	<input type="text" value="USD"/>	
<input type="text" value="02/27/2017"/>	<input type="text" value="Meals- Domestic Travel Daily"/>	<input type="text" value="breakfast and lunch"/> 235 characters remaining	<input type="text" value="Cash"/>	<input type="text" value="12.80"/>	<input type="text" value="USD"/>	
<input type="text" value="03/02/2017"/>	<input type="text" value="Meals- Domestic Travel Daily"/>	<input type="text" value="airport lunch"/> 241 characters remaining	<input type="text" value="Cash"/>	<input type="text" value="6.14"/>	<input type="text" value="USD"/>	
<input type="text" value="03/02/2017"/>	<input type="text" value="Gratuity-Domestic"/>	<input type="text" value="hotel room gratuity"/> 235 characters remaining	<input type="text" value="Cash"/>	<input type="text" value="10.00"/>	<input type="text" value="USD"/>	

ER Train Tracks

- For newly created expense reports, there are stops on the train tracks.
- Multiple approvers



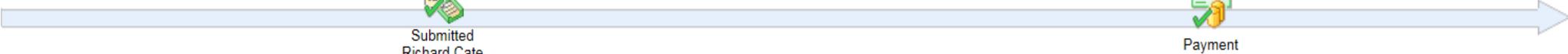
- One approver and no Prepay Audit



Old ER Train Tracks

- Submitted and Payment
- Action history

▼ Approval History



A horizontal timeline arrow pointing right, with two icons: a document with a checkmark and a coin with a checkmark.

Action	Role	Name	Date/Time
Submitted		Lori Laquerre	03/10/2017 3:22:26PM
Approved	Expense Manager	Erin Fitzgerald	03/13/2017 8:28:57AM
Approved	Prepay Auditor	Tiffany Barker Cook	03/16/2017 12:57:00PM

Comments

View Expense Report

Expense Details

Tiffany Barker Cook

Actions

Business Purpose Professional Development
Description Alliance 2017 02.27-03.02.2017

Report 0000100751 Paid
Created 03/06/2017 Tiffany Barker Cook
Last Updated 03/09/2017 Lisa Keeffe

Post State Posted US State/Country Nevada

Totals

View Printable Version

View Analytics

Notes

Attachments (1)

Employee Expenses (13 Lines)	962.35 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee 962.35 USD **Amount Due to Supplier 0.00 USD**

I certify that the information provided above is true and correct, that there are no alcohol expenses in / with any travel meals, and I did not pay for nor seek reimbursement for this expense by any other method. I certify that any international airfare was purchased in compliance with the Fly America Act. Reimbursement of / payment for items requires them to become property of UVM.

Submitted On 03/06/2017 Submitted By

▼ Approval History



Action	Role	Name	Date/Time	Comments
Submitted		Tiffany Barker Cook	03/06/2017 12:29:37PM	
Sent Back For Revision	Expense Manager	Erin Fitzgerald	03/06/2017 2:33:04PM	
Resubmitted		Tiffany Barker Cook	03/06/2017 2:42:13PM	
Approved	Expense Manager	Erin Fitzgerald	03/06/2017 4:36:43PM	
Approved	Prepay Auditor	Lisa Keeffe	03/09/2017 8:42:42AM	

Personalize Page

OK Cancel [Copy Settings](#)

Page Personalization

Put this page in front (the current tab) when I come into this component.

Save tabbing order personalized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence.
This new Tab order setting may be overridden by the people code command SetCurspos().
To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

Clear Tabbing Order Restore Default

Include In Tabbing Order Remove From Order Move Up In Order Move Down In Order

All Search >> [Advanced Search](#) [Last Search Results](#)

[Print](#) | [New Window](#) | [Help](#) | [Personalize Page](#)

Create Express Expense Report

[Save for Later](#) | [Summary and Submit](#)

Tiffany Barker Cook ?

Actions

*Business Purpose

*US State/ Country

*Report Description

[Attachments](#)

*Trip Description/Dates/Comments

Expenses ?

Expand All | Collapse All Add: [My Wallet \(0\)](#) | [Quick-Fill](#)

Total 0.00 USD

Date	Expense Type	Description	Payment Type	Amount	Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="USD"/>

*Billing Type

254 characters remaining

Modify Expense Report Save for Later Summary and Submit

Tiffany Barker Cook Actions ...Choose an Action GO

*Business Purpose Professional Development
*Report Description HEUG Conference
Report 0000112299 Pending
*US State/ Country Italy
Authorization ID 0000009002
Attachments
*Trip Description/Dates/Comments
International HEUG Conference

Expenses Expand All Collapse All Add: My Wallet (0) Quick-Fill Total 800.00 USD

Table with 6 columns: *Date, *Expense Type, *Description, *Payment Type, *Amount, *Currency. Contains 6 rows of expense entries including meals, airfare, and hotel/lodging costs.

Expand All Collapse All Total 800.00 USD

User Defaults, Preferences, & Profile

- User Defaults
 - Default chartstring
 - Direct Deposit
 - Main Menu > Employee Self-Service > User Defaults
- Preferences
 - Create/Update templates (*Advanced*)
 - Delegate Entry Authority
 - Main Menu > Employee Self-Service > Travel and Expenses > User Preferences
- Review/Edit Profile
 - Edit
 - User Defaults
 - Default creation methods
 - Expense defaults
 - Review
 - Employee Information
 - Default Chartstring
 - Bank accounts

User Defaults

UserId: efitzger Erin Fitzgerald  Empl ID 0028138

General Preferences

Journal Source Default Projects Business Unit

Travel Default Chartstring and Direct Deposit Information

OU	Dept	Fund Code	Source	Function	PC BU	Project	Activity	Program Code	Purpose	Property
<input type="text" value="01"/>	<input type="text" value="11290"/>	<input type="text" value="100"/>	<input type="text" value="100001"/>	<input type="text" value="521"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>

Do you want Direct Deposit or a Check?

Bank Account Information

Default Account	Account Source	External Bank ID (last 4 digits)	Bank Account # (last 4 digits)
1 <input checked="" type="checkbox"/>	Payroll	<input type="text" value=""/>	<input type="text" value=""/>

PurCard Default Chartstring (if employee has PCard)

First 1-2 of 2 Last

Cardmember Number	Operating Unit	Department	Fund Code	Source	Function	PC Business Unit	Project	Activity	Program Code	Purpose	Property
1 *****631766	<input type="text" value="01"/>	<input type="text" value="11290"/>	<input type="text" value="100"/>	<input type="text" value="100001"/>	<input type="text" value="521"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>
2 *****631758	<input type="text" value="01"/>	<input type="text" value="11290"/>	<input type="text" value="100"/>	<input type="text" value="100001"/>	<input type="text" value="521"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>

Requisition Default Chartstring and Location

OU	Dept	Fund Code	Source	Function	PC BU	Project	Activity	Program Code	Purpose	Property
<input type="text" value="01"/>	<input type="text" value="11290"/>	<input type="text" value="100"/>	<input type="text" value="100001"/>	<input type="text" value="521"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>	<input type="text" value="0000"/>

Location UVM Disbursement Center
 19 Roosevelt Highway
 Suite 120
 Colchester VT 05446



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Welcome to UVM, Tiffany Barker Cook

All Search Advanced Search Last Search Results

Personalize Content | Layout ? Help

- Menu**
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 - ▶ * UVM Reports
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 - ▶ Treasury Dashboards
 - ▶ My Preferences
 - ▶ My Dictionary
 - ▶ My Feeds

User Preferences – Delegate Entry

PeopleSoft Employee Por x

Secure | https://catalyst-test.uvm.edu/psp/FSSUP/EMPLOYEE/ERP/h/?tab=DEFAULT

Bookmarks | Google | The University of Ver | Programs | Policies | Information | School | Rescue | Personal | Banking | Tech | Other bookmarks

Favorites | Main Menu

Home | Worklist | Process Monitor | Report Manager | Add to Favorites | Sign out

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- My Dictionary
- My Feeds

Review/Edit Profile

Employee Data | Organizational Data | **User Defaults** | Bank Accounts | Corporate Card Information

Tiffany Barker Cook

Default Creation Method

*Expense Report

*Time Report

*Travel Authorization

Expense Defaults

Report Description

Business Purpose

Originating Location

Expense Location

Transportation ID

Per Diem Range

Billing Type

Payment Type

Credit Card

Number of Nights

Accounting Detail Default View

- Collapsed
- Collapsed**
- Expanded

Expense Type Defaults

Expense Type

*Expense Type

Payment Type

Billing Type

Project Defaults for Expenses

Project Defaults for Expenses

Enabled	PC Business Unit	Project	Description	Activity	Description	Percentage
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>



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- ▶ My Feeds

Submission Process

Self-Service Customers

- Enter/Submit in PeopleSoft
 - Attach documentation to expense report
- Notify approver (*and* travel@uvm.edu)
- Notify travel@uvm.edu
 - Email
 - PeopleSoft notification button
 - Campus mail

Full-Service Customers

- Send request to travel@uvm.edu
 - If entered in PeopleSoft notify travel@uvm.edu to obtain approval continue processing

NOTIFY TRAVEL@UVM.EDU



Travel and Expense Approval

Self-Service Customers

(or full-service customers and are interested in approving in PeopleSoft)

T&E Approval Worklist

Main Menu > Manager Self Service > Travel and Expense Center > Approve Transactions > Approve Transactions

Favorites > Main Menu > T&E Administration > Approve Transactions > Approve Transactions

Home | Worklist | Process Monitor | Report Manager | Add to Favorites | Sign out



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Welcome to UVM, Erin Fitzgerald

All Search >> Advanced Search

Print | New Window |

Overview | **Expense Reports** | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors

▶ Search Pending Transactions ?

▶ Change Sort Order ?

Select All Clear All

Approve

Refresh List

Transactions to Approve ?

Personalize | View All | | | First 1-25 of 57 Last

Select	Alert	Total Amount	Curr	Budget Status	Name	Employee ID	Description	Transaction ID	Date Submitted	Status	Role
<input type="checkbox"/>		658.50	USD	Valid	Lord, Jennifer	0019077	dafsdfasd	0000108319	04/02/2018	Submitted for Approval	Department Manager
<input type="checkbox"/>		4144.62	USD	Valid	Blom, Deborah	0091390	10/27-11/19/17Bolivia Research	0000108013	03/02/2018	Submitted for Approval	Department Manager
<input type="checkbox"/>		47.08	USD	Error in Budget Check	Trigg, Sophia A.	0122174	2-15-2018 Trip to Barre (VHS)	0000108021	02/16/2018	Submitted for Approval	Department Manager

Regular Worklist



Worklist

Worklist for efitzger: Erin Fitzgerald

Detail View

Worklist Filters [dropdown] Feed

Worklist Items						Personalize	Find	View All	First	1-25 of 79	Last
From	Date From	Work Item	Worked By Activity	Priority	Link						
Aide Ramirez-Shepard	03/28/2018	Approval Routing	Approval Workflow	2-Medium	TAApapproval, 88756, SHARE, 1900-01-01, N, 0, TRAVEL_AUTH_ID:0000008734, RDC:RA,1,A,	Mark Worked					Reassign
Annie Stevens	04/02/2018	Approval Routing	Approval Workflow	2-Medium	TAApapproval, 88797, SHARE, 1900-01-01, N, 0, TRAVEL_AUTH_ID:0000008754, RDC:RA,1,A,	Mark Worked					Reassign
Ashley Goff	03/29/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval, 1310458, SHARE, 1900-01-01, N, 0, SHEET_ID:0000108315, RDC:RA,1,A,	Mark Worked					Reassign

Approving

- Budget checking
- Making changes
 - Amount
 - Chartstring
 - Deny a single line
- View approved transactions



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All Search

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[View Expense Report Approval video tutorial \(MP4\)](#)

Reviewing Chartstrings

Query UV_EX_RPT_LISTING – Expense Report Details
to view chartstrings of all lines of an expense report

UV_EX_RPT_LISTING - Expense Report Details

Expense Report ID Like(%)

Emplid Like(%) 

Creation Dt From 

Creation Dt To 

OU Like(%) 

Dept Like(%) 

Source Like(%) 

Project Like(%) 

Program Like(%) 

Merchant (%)

Preferred Merchant (%)

[View Results](#)

Report ID	ID	Status	Created	Date	Name	Line	Descript	Long Descr	Distribution Li	Account	Descr	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property	Amount	Deny	Expense Date	Merchant	Preferred Merchant	Transaction Currency
-----------	----	--------	---------	------	------	------	----------	------------	-----------------	---------	-------	-----------	------	------	--------	----------	-------------	---------	----------	---------	---------	----------	--------	------	--------------	----------	--------------------	----------------------

Download to Excel if necessary

UV_EX_RPT_LISTING - Expense Report Details

Expense Report ID Like(%)

Emplid Like(%)

Creation Dt From

Creation Dt To

OU Like(%)

Dept Like(%)

Source Like(%)

Project Like(%)

Program Like(%)

Merchant (%)

Preferred Merchant (%)

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(14 kb\)](#)

[View All](#)

First 1-10 of 10 La

	Report ID	ID	Status	Created	Date	Name	Line	Descript	Long Descr	Distribution Li	Account	Descr	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property	Amount	Deny	Expense Date	Merchant	Preferred Merchant	Transacti Currenc
1	0000109128	0028138	Paid	04/15/2018	04/26/2018	Fitzgerald, Erin Mary	1		RT - asst controller interview	1	60515	Mileage Domestic	01	11290	100	100001	521				0000	0000	0000	2.680	Reimburseable	01/02/2018			USD

Reviewing Payment & Check Information

Review payment information for:

- yourself
- anyone who has delegated entry authority to you



Employee Expense Payments

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID	begins with ▼	<input type="text" value="0028138"/>	<input type="button" value="🔍"/>
Name	begins with ▼	<input type="text"/>	
Payment Reference	begins with ▼	<input type="text"/>	
SetID	= ▼	<input type="text" value="SHARE"/>	<input type="button" value="🔍"/>
Bank Code	begins with ▼	<input type="text"/>	<input type="button" value="🔍"/>
Bank Account	begins with ▼	<input type="text"/>	<input type="button" value="🔍"/>
Payment Number	begins with ▼	<input type="text"/>	

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-13 of 13 Last

Empl ID	Name	Payment Reference	SetID	Bank Code	Bank Account	Payment Number	Creation Date
0028138	Fitzgerald, Erin Mary	0006164	SHARE	FI001	BN08	0000446851	04/27/2018
0028138	Fitzgerald, Erin Mary	0005509	SHARE	FI001	BN08	0000440059	02/09/2018



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Employee Expense Payment

Employee Payment History

Erin Fitzgerald

Payment Information

Payment Date 04/27/2018

Payment Amount 21.96 USD

Payment Status Paid

Payment Reference 0006164

Payee Address

Payments

Type	ID	Description	Status	Created	Amount	Currency
Expense Report	0000109128	Mileage to campus for meetings	Paid	04/15/2018	21.96	USD

[Return to Review Payments](#)

Save

Return to Search

Previous in List

Next in List

Helpful Links

- Travel Policy
 - <https://www.uvm.edu/sites/default/files/UVM-Policies/policies/travel.pdf>
- Automobile Rental
 - <https://www.uvm.edu/sites/default/files/UVM-Policies/policies/autorent.pdf>
- Business Meals
 - <https://www.uvm.edu/sites/default/files/UVM-Policies/policies/businessmeals.pdf>
- PeopleSoft User Guides
 - <https://www.uvm.edu/finance/user-guides>
- Travel Webpage
 - <https://www.uvm.edu/finance/travel>



Questions?

