

Submitting an Expense (Unit4)

This article will outline each of the 3 steps to successfully submitting an expense for reimbursement:

- [Create an Expense Claim](#)
- [Upload a Receipt](#)
- [Match a Receipt to an Expense](#)

Training Videos

- [How to Submit an Expense Reimbursement](#)
- [How to Upload a Receipt](#)

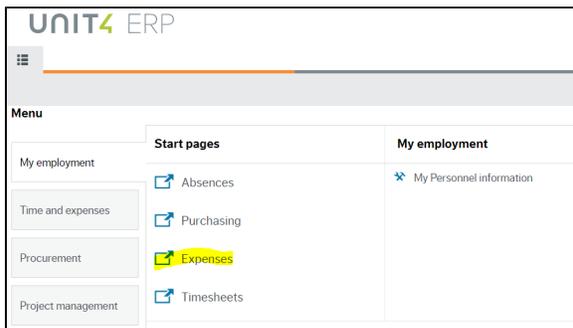
Related Articles:

- [Delete an Expense \(Unit4\)](#)
- [Submitting a Mileage Claim \(Unit4\)](#)
- [Submitting a Travel Request, Advance and Expense \(Unit4\)](#)
- [Finance FAQs](#)
- [Submitting and Tracking a Purchase Request \(Unit4\)](#)
- [Approving Purchase Requests - Supervisor \(Unit4\)](#)
- [Budget Officer Reports - Supervisors \(Unit4\)](#)
- [Training & Virtual Support \(Unit4\)](#)

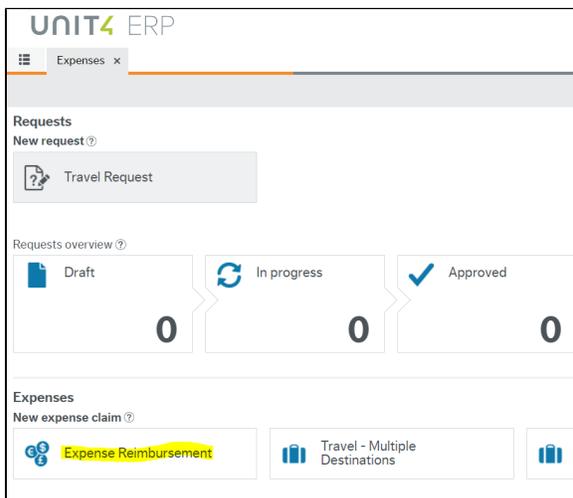
Create an Expense Claim

The following steps outline instructions to submit an expense claim in Unit4.

1. Navigate to **"My Employment"** and click on **"Expenses"**.



2. In the expenses screen, click on **"Expense Reimbursement"**.



3. The following screen will open - complete the highlighted fields:

Expenses: Expense Reimbursement

What was the purpose?

Date: 6/4/2020

Cost categories:

Expenses

Category	Expense date	Description	Amount
Total expenses: \$ 0.00			

Expense overview: Expense transactions: 0 receipts, 1 mobile receipt

- "Purpose"** – this would be reason for the expense.
- "Date"** – this is the date of expense. If you are submitting mileage for an entire month, simply use the date of submission.
- "Employee"** – this is your name, you cannot submit an expense on behalf of someone else.
- "Work Order"** – this is where you enter the work order responsible for paying the cost.
- Click on **"Add expense"** to add the expense line.

4. To submit additional expenses, select **"Add expense"** for each expense item.

- **"Category"** – this field gives you a drop-down menu of expense types to select.
- **"Expense Date"** – this is the date of expense item.
- **"Description"** – this field is where you can give details regarding your expense.
- **"Curr. amount"** – this is where you enter the expense total, less any GST (see NOTE below).

Note: You must subtract GST from your expense totals and submit on a separate expense line:

Expenses: Expense Reimbursement

What was the purpose?

Date: 6/6/2020

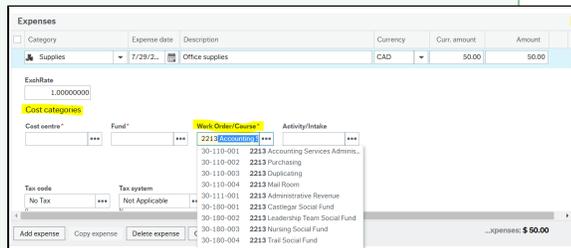
Expenses

Category	Expense date	Description	Currency	Curr. amount	Amount
Supplies	7/29/2020	Rules and calculator	CAD	87.40	87.40
GST on expenses	7/29/2020	GST tax	CAD	4.09	4.09

...expenses: \$ 91.49

Example - Splitting an Expense to Multiple Work Orders:

- In this example, an expense for office supplies worth \$100.00 (excluding \$5.00 GST) needs to be split equally between two work orders.
- To charge an expense to more than one work order, you will need to split the expense into separate line items.
 - a. Select **"Add expense"** for expense line #1 = \$50.00 dollars.
 - i. Select a work order using the down arrow () to reveal Cost Categories for that expense line.
Note: Enter the Work Order first and press the tab button, the other Cost Categories fields will automatically populate. Activity/Intake is not required and should be left blank. Do not enter any other information, only the Work Order.



Category	Expense date	Description	Currency	Curr. amount	Amount
Supplies	7/29/20	Office supplies	CAD	50.00	50.00

ExpRate: 1.00000000

Cost categories:

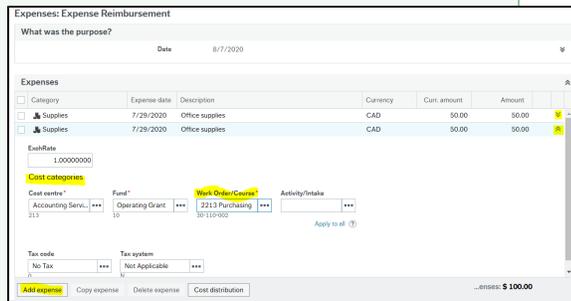
Cost centre*	Fund*	Work Order/Course*	Activity/Intake
		2213 Purchasing	
		30-110-001	2213 Accounting Services Admins...
		30-110-002	2213 Purchasing
		30-110-003	2213 Duplicating
		30-110-004	2213 Mail Room
		30-111-001	2213 Administrative Revenue
		30-180-001	2213 Castlegar Social Fund
		30-180-002	2213 Leadership Team Social Fund
		30-180-003	2213 Nursing Social Fund
		30-180-004	2213 Tax Social Fund

Tax code: No Tax, Tax system: Not Applicable

Buttons: Add expense, Copy expense, Delete expense

...expenses: \$ 50.00

- ii. When finished, use the up arrow to minimize ().



Expenses: Expense Reimbursement

What was the purpose? Date: 8/7/2020

Category	Expense date	Description	Currency	Curr. amount	Amount
Supplies	7/29/2020	Office supplies	CAD	50.00	50.00
Supplies	7/29/2020	Office supplies	CAD	50.00	50.00

ExpRate: 1.00000000

Cost categories:

Cost centre*	Fund*	Work Order/Course*	Activity/Intake
Accounting Serv...	Operating Grant	2213 Purchasing	

Tax code: No Tax, Tax system: Not applicable

Buttons: Add expense, Copy expense, Delete expense, Cost distribution

...expenses: \$ 100.00

- b. Select **"Add expense"** for expense line #2 = \$50.00 using the second work order.
 - i. Select a work order using the down arrow () to reveal Cost Categories for that expense line.
Note: Enter the Work Order first and press the tab button, the other Cost Categories fields will automatically populate. Activity/Intake is not required and should be left blank. Do not enter any other information, only the Work Order.
 - ii. When finished, use the up arrow to minimize ().
- c. Select **"Add expense"** for expense line #3 = \$5.00 for the GST.

Upload a Receipt

1. Review **"Expenses Overview"**, located to the far right-hand section. Here you will see the ability to upload and match your receipts, and review your expense claim total.

Expenses: Expense Reimbursement

What was the purpose? Date: 6/17/2020

Expense transactions: 0 matched, 1 available

Category	Expense date	Description	Currency	Curr amount	Amount
Supplies	7/29/2020	Office supplies	CAD	50.00	50.00
Supplies	7/29/2020	Office supplies	CAD	50.00	50.00
GST on expenses	7/29/2020	GST tax	CAD	5.00	5.00

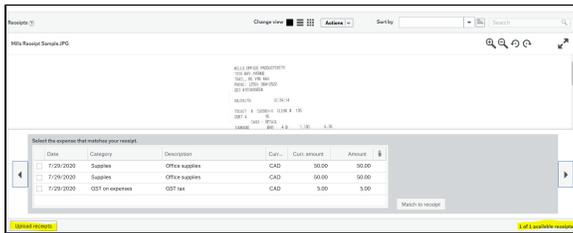
Expenses Summary:

Category	Amount
Office supplies	50.00
Office supplies	50.00
GST tax	5.00
Total	105.00

- To upload a receipt, select **"Receipts" > "Add or Show Receipts"**.
 - If you have not uploaded any receipts, select **"Upload receipts"** to find a scanned receipt saved on your computer:

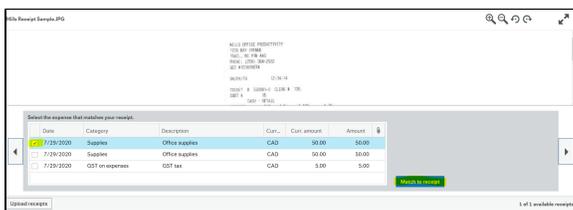


- If you have uploaded receipts that are not matched, you will see these open first. To upload a new receipt, select the **"Upload receipts"** button at the bottom of the screen:



Match a Receipt to an Expense

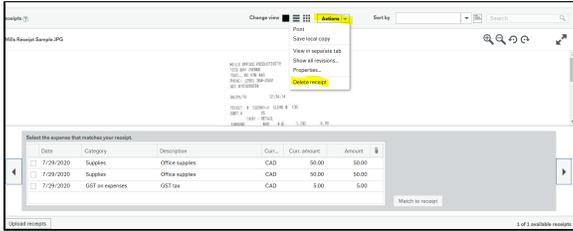
- To match a receipt to your expense item:
 - Select the checkbox beside the expense line you wish to match
 - Note:** you can only match one expense line at a time
 - You will see the **"Match to receipt"** button turn blue, indicating a match is ready. Click to match.



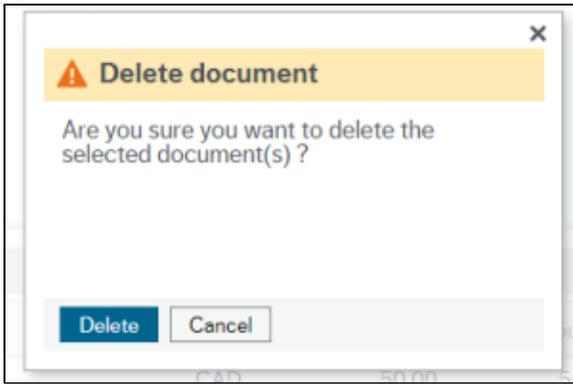
- Once matched, a confirmation window will open:
 - Note:** if you've matched a receipt in error, click the **"Undo"** button.



- To delete a receipt or document uploaded in error:
 - navigate to **"Actions"** and select **"Delete receipt"** from the dropdown list.

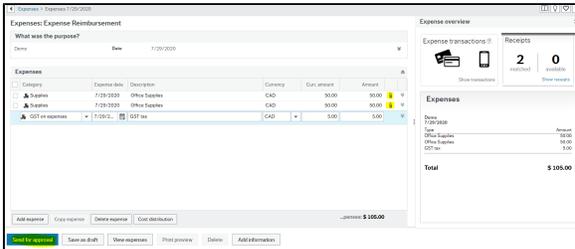


b. A confirmation window will open asking you to confirm deletion.



Note: A receipt is not required for GST expense.

3. Once you have matched each expense line to a receipt, you will see a paperclip icon (📎) indicating a matched receipt:



*****NOTE: You must upload and match a receipt for all expense lines, the only exceptions are Mileage and GST. Expect to see an error code if your forget to upload and match your receipts to each expense line. If you have split costs for an expense item with one receipt, you will need to upload that receipt twice and match it to each line.**

4. Select "Send for approval" to submit.

