ONLINE EXPENSE TUTORIAL

FY 2018
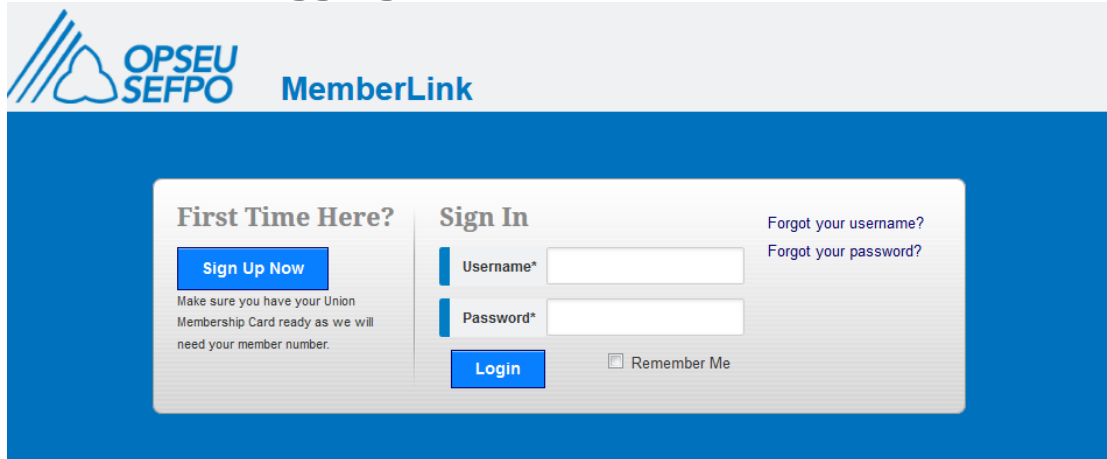
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Logging into the Member Portal

REGISTRATION

BEFORE YOU BEGIN

You will need two pieces of information to register successfully and gain access to the OPSEU Member Portal. First, you will need to know your **OPSEU Union Number**. You can find this number on your OPSEU Membership Card. And, you will need your **First Name** and **Last Name**- exactly as it is entered in our membership database. If you need assistance, you can call the nearest OPSEU Regional Office for assistance. Once you have the necessary information at hand, open a web browser and go to: **https://members.opseu.org –** which is seen in the picture above

Before you can Sign-In you must Sign-Up. Click on the **[Sign Up Now]** button.

Union ID: Enter your OPSEU Union number

First Name: Enter your first name as recorded in our membership database

Last Name: Enter your last name as recorded in our membership database

Username: Create a valid Username. (Note: You are free to create any logon name you wish. It does not have to be the same as your actual name. For example you can use your Union # as your Username.)

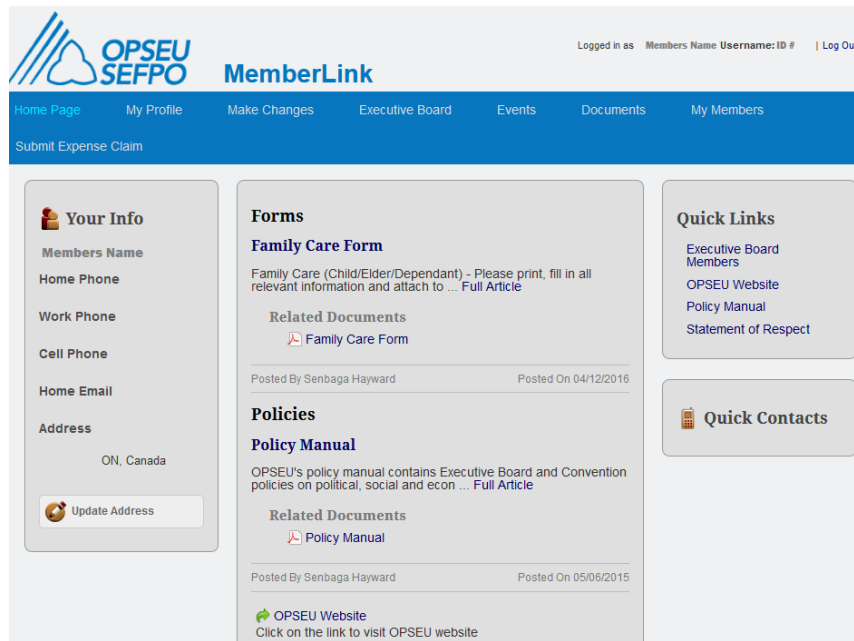**Password:** Create a valid password
Confirm Password: Re-enter the password

Keep this information safe and do not share it with anyone. After completion of registration, please enter in the Username you've selected and the Password.

Getting to Know Your Portal

MEMBER PORTAL HOME SCREEN

After logging into your Member Portal account, you will be brought to your Home Page. This is where you will have access various kinds of useful information.

The home page header categories are as follows:

- **Home Page**: Directs you back to your home page
- **My Profile**: Where you are able to view your general information (jobs, positions, advances, expenses, etc.)
- **Make Changes**: Where you are able to update your address, password, email, and username
- **Executive Board**: different Committees and their members, and Meeting Minutes
- **Events**: Where you can view your Registered Events and Available Events
- **Documents**: Where you are able to access and download various documents
- **My Members**: Lists all the members in your Local (available only for Local Presidents)
- **Submit Expense Claim**: Where you are able to view your submitted claims and submit online expense claims

To submit an expense claim, please click on the header category [**Submit Expense Claim**].

Submitting an E-Claim

FIRST STEPS

Before you start the submission process, please ensure that <u>all receipts have been scanned and are legible</u> to be attached to your electronic claim.

After submitting your e-claim, the status changes from *"Add New Claim"* to *"Pending."* You are able to see if the claim has been processed at which point the status will then change from *"Pending"* to *"Paid."*

Please note that if the Claim Status says *"Not Attended,"* please contact the event coordinator to have the status changed so you are able to submit the online e-claim.

Submit Expense Claims

- We are displaying eligible events for the last six months.
- Claims may be submitted online for up to three months after the event.
- Claims may only be submitted for events that the member attended.
- Please contact the accounting department in order to submit a claim for an event that is more than three months old or if attendance was not recorded properly
- To download the latest version of the Advance Request Form, Family Care Form, or Direct Deposit Agreement, please check the Documents menu.

Search: [   ]

Event Name	Start Date	End Date	Claim Status	Attended
Divi Test Event	09/28/2016 0:00	09/30/2016 0:00	Did not attend	No
TEST IT Event	09/28/2016 0:00	09/30/2016 0:00	Add New Claim	Yes

Showing 1 to 2 of 2 entries

When you have entered the Submit Expense Claim page, please click on [Add New Claim] to begin the submission process.

ADDING EXPENSES TO YOUR E-CLAIM

As soon as you've entered into your e-claim, you are now able to add your expenses to the claim. The expenses that you will be able to enter into are:

- Mileage
- Meals
- Family Care
- Misc. Expenses: which include airfare, cellular phone, hotel, parking, print/postage, registration/affiliation fees/ supplies, taxi/train/bus, own time, and lost wages

Please note that **ALL** expenses require a document to be attached, except mileage when free parking is given. These documents are the scanned receipts, approval emails, and etc.

At this time any grievance, arbitration, honorariums, OPSEU childcare worker expense claims will need to be submitted on paper expense claims.

MILEAGE EXPENSE

If you are submitting a mileage expense, please click [Add New] under the Mileage section. The pop-up below appears and this is where members are now able to input the mileage for each day.

For each date of travel, members must submit a parking receipt or explanation of parking and location in order for tracking purposes and to be ensure the expense is properly processed. Please provide the "**To**" and "**From**" destination points to be fully reimbursed for mileage.

Example Submission: For example, you've traveled November 7th, 2016 to an event with two passengers from home to OPSEU Head Office. You would input the data as follows- distance traveled with two members is 200km. the two members are *Bob Last* and *Susan First* from Local 000. The system automatically populates to the amount you are to receive for the distances and passengers traveled with.

If you've stayed overnight at a hotel and received free parking at the hotel, you must state that in the notes section and input a new expense for the return mileage. Also note that if you are traveling alone, please select "0" for the number of passengers. After you've inputted all the information click "Save."

MEAL EXPENSE

To submit a Meal expense, click [Add New] under the meals section and the pop-up below will appear.

Meals

Date*		2016-10-07

If this meal claim is for a child age 12 or under, select Yes for Child Meal Claim.

☐ Child Under 12	Child Name	
☐ Breakfast	Breakfast Rate	$ 13.00
☐ Lunch	Lunch Rate	$ 19.00
☐ Dinner	Dinner Rate	$ 29.00
Value		$ 0.00

Save   Cancel

Please select the date of the expensed meals (please note that each date of meals to be expensed must be inputted separately). After the date is selected, please click the boxes on the left to select the meals that are to be expensed. After the boxes are selected the amount will automatically populate and you will be able to see the value or amount to be expected for the date.

Please note: that if you are claiming dependant meals, members are to select the dependant's name from the drop down list provided. If the member's dependant is under 12, please select the "Child Under 12". As per OPSEU policy, children 12 and under are entitled to 50% of the standard meal rates. Also, members must "Add New" for each day of meals they are claiming for both themselves and their child(ren).

Meals

Date*		2016-10-07

If this meal claim is for a child age 12 or under, select Yes for Child Meal Claim.

☑ Child Under 12	Child Name	[Insert Child Name Here]
☐ Breakfast	Breakfast Rate	$ 6.50
☐ Lunch	Lunch Rate	$ 9.50
☐ Dinner	Dinner Rate	$ 14.50
Value		$ 0.00

Save   Cancel

After inputting all the information in the meal expense pop-up, click "save" to continue.
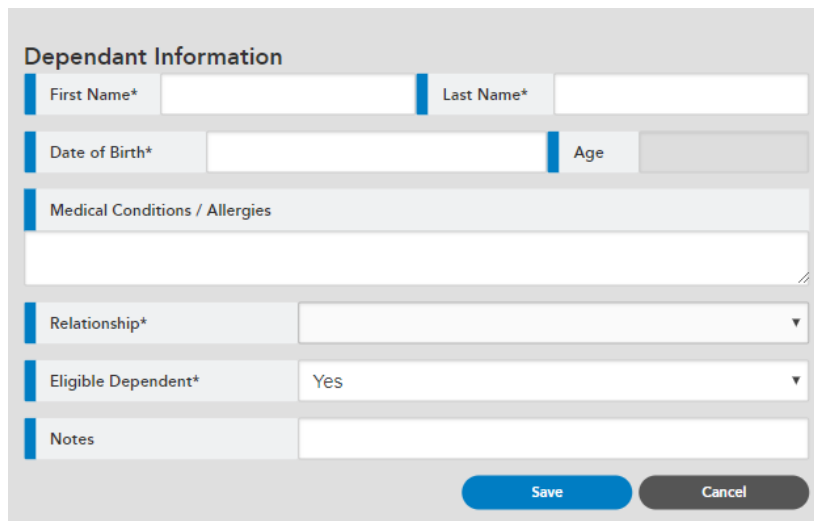
Please note that if you are claiming any expenses for a dependent, you must complete and include the family care form with each e-claim. Please see the family care section for more information.

FAMILY CARE EXPENSE

If a member has incurred any family care expenses during an OPSEU event and they are claiming expenses, the family care form must be completed and attached to each e-claim. Members are able to download and print the family care form in the portal under the documents header.

You must first select the [Add Dependant] option at the top of the page and input all the relevant information.
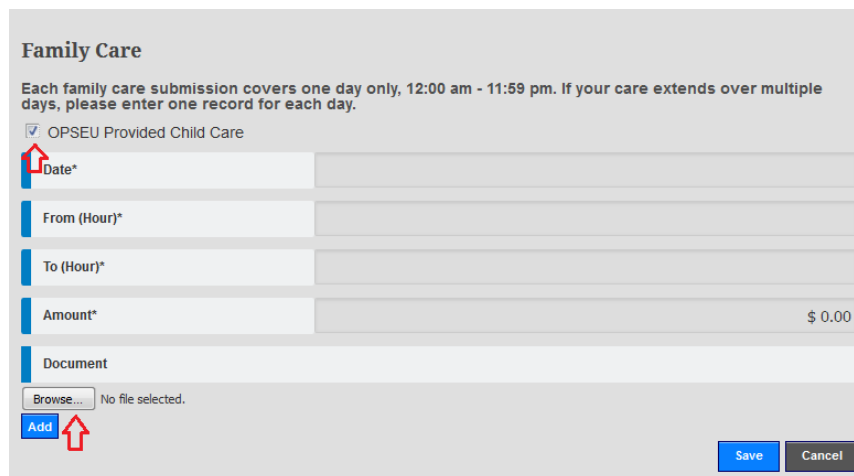

After the dependant information is inputted, you are now able to add the dependant's meals or family care expenses now and for future expense claims.

If you are claiming family care expenses, click [Add New] under the family care section to continue. If **OPSEU has provided child care** at the event, please select the check box at the top that states "*OPSEU Provided Child Care*" and attach the family care form. You will only need to complete the bottom portion of the family care

form and include your signature. If **you've received family care at your residence**, please select the date and the hours of when family care was provided and then attach the family care form. After inputting the information, the amount will automatically populate with the current OPSEU family care rates.

Family/Attendant Care Claims
Please complete for all family care claims (please print)

Care Provider

Name	
Address	
City	Postal Code
Telephone	
Signature of Care Provider:	

Children / Dependents

Name		Age
Name		Age
Name		Age
Name		Age

Member confirmation
I affirm that without such family care I would have been unable to attend this OPSEU activity.

Signature: _____   Date: _____

You **must** create a new expense for each date that Family Care was provided or received.

MISCELLANOUS EXPENSES

This section is for members to claim:

- Hotel Expenses
- Parking Expenses
- Train/Taxi/Bus Expenses
- Airfare Expense
- Cellular Phone Expense
- Print/ Postage Expense
- Registration/Affiliation Fees Expenses
- Supplies Expense
- Own Time / Lost Wages

Please note that all these expenses require a receipt or documentation in order to be reimbursed. If you have **any** approval emails or other documentation please also attach it to the expense.
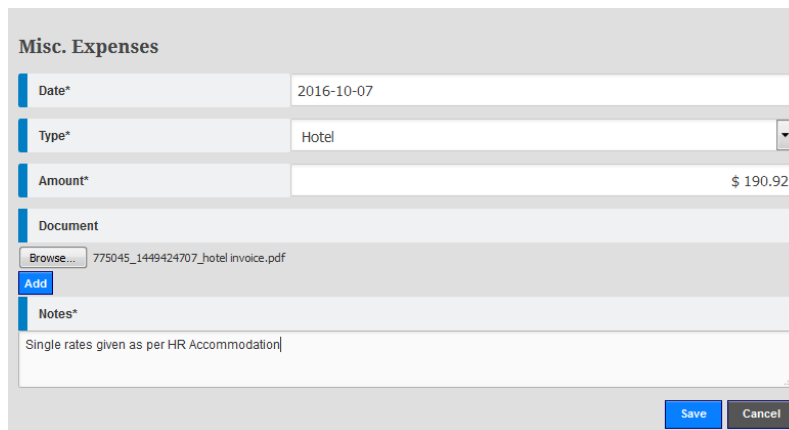
Note: All members who are claiming Own Time will be paid if the member is using lieu days, accumulated credits, or vacation days. Own Time **will not** be reimbursed for an unpaid work day. Claims for Own Time **must** be supported with documentation from the employer confirming the type of credit being used. Lost wages **must** also be supported with documentation from the employer confirming the standard rate of pay and the usual hours worked for the date in question.

Hotel Expense

To Submit a Hotel Expense, click [Add New] in the Misc. Expense section and select "*Hotel*" in the drop down menu. Input the date of stay, amount charged, and browse and add the scanned copy of the receipt.

If you have a standing **HR Accommodation**, please make note of the accommodation in the Notes portion. Please also ensure that you've attached an itemized, balance receipt for full reimbursement.
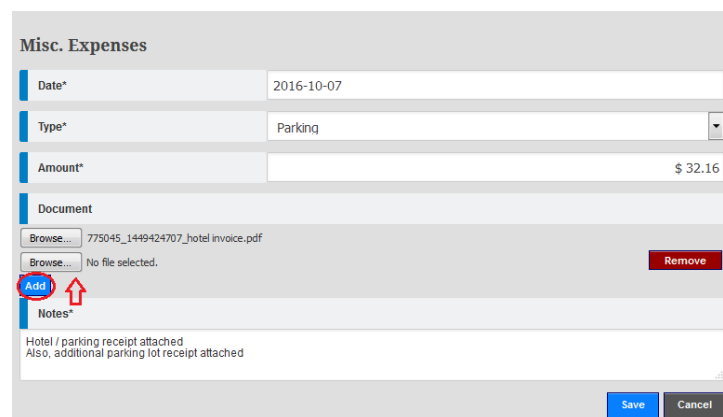
Note: Just a reminder, if you've received parking at the hotel please **separate** the expenses and include the hotel receipt with the parking charge in the Misc. Expenses—parking expense.

Parking Expense

To submit a Parking Expense, click [Add New] in the Misc. Expense section and select "*Parking*" in the drop down menu. Please input the date, the amount, and attach applicable parking receipts for the date inputted.

If you have multiple parking receipt documents, you can attach multiple documents by select the "Add" button located below the "Browse" button.

Updated July 2018

Taxi / Train / Bus Expense

To submit a taxi/train/bus expense, please note that all expenses require a document to be attached. Remember to provide the information of the type of travel you are claiming, either bus, train or taxi in the notes portion.

Note: if more than one method of transportation was used, please add the total amount and attach all applicable receipts that would equal the total amount claimed.

Advances

If OPSEU has issued you an advance, you will not need to input anything regarding the advance on your e-claim. Each advance that is issued is for a specific event and will be deducted as the expense is being processed.

To receive an advance, please complete the advance form and forward it to advances@opseu.org for review and processing.

Final Review of Claim

After inputting all applicable expenses for the e-claim, please click on the [**Submit**] button located at the bottom of the page.

After submitted the e-claim, you are able to do a final review of all expenses submitted for the claim. By selecting the [**Confirm**] button after review, you have consented that all the expenses for the e-claim have been inputted and at this time has now been submitted to Head Office for review.

After the e-claim has been submitted, you will be located back to the Submit Expense Claim page and the status of the claim will now have changed from "*Add a New Claim*" to "*Pending Approval*".

E-Claim TIPS

QUICK TIPS

➤ **What happens if the event claim status states "Did Not Attended"?**
OPSEU will update all attendance registers within 48 hours after the event has concluded. After they have been updated, members will then be able to submit an online expense claim. If the event register has yet to be updated after the allotted time period, please contact event coordinator.

➤ **What happens if I have forgotten to attach an additional receipt to my e-claim? What can I do?**
If members have forgotten to submit a receipt for an e-claim they are unable to re-submit the receipt via Member Portal. For reimbursement, forward all receipts to claims@opseu.org and include members name, Union ID number, date of event, and name of the event.

➤ **Ensure the following for <u>FULL</u> reimbursement:**
  - All hotel receipts are itemized
  - The members name is on the receipt
  - Dates of the receipts are correct
  - Train / Airfare receipts are itemized
  - All the information and notes haves been provided to the clerks for accurate processing
  - The family care form has been attached to the claim for any family care relevant expenses

  If all these have been done correctly and there is still an issue, please contact claims@opseu.org

➤ **I have pre-approval to travel prior the event date, how do I submit these expenses?**
You are able to submit expenses for up to seven days before and after the event date. This will allow for any additional expenses incurred due to travel or extenuating circumstance. Please **attach** pre-approval emails to the e-claim for full reimbursement.

➤ **Why can I not submit a claim when the Claim Status says *More than 3 months ago*?**
As per policy, expenses are to be submitted within three months after the event date. The policy manual states that after the three month period, expense submissions will not be honoured, except in unusual circumstances (subject to appeal procedure). (August 21-22, 1980 B, p.13) If your expense is more than three months since the conclusion of the event, you will need to send a paper claim, with applicable receipts to claims@opseu.org , indicating you wish to appeal to the First Vice-President/Treasurer for consideration.