PEOPLESOFT FINANCIALS

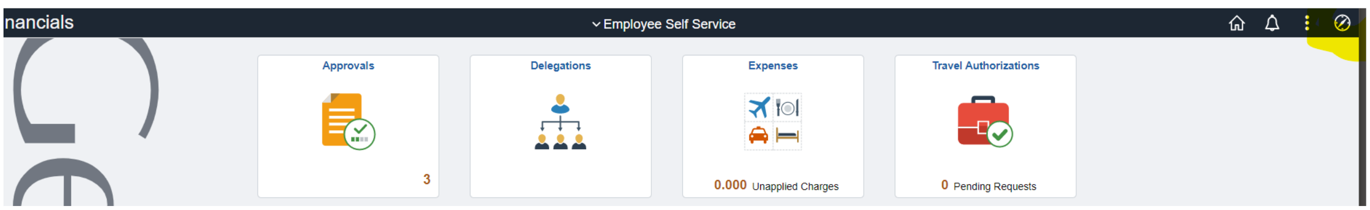
Commuter Pass Reimbursement

PeopleSoft has a travel and expense template that helps you quickly create an Expense Report for bus pass reimbursement. Just log in to **PeopleSoft Financials** to get started.

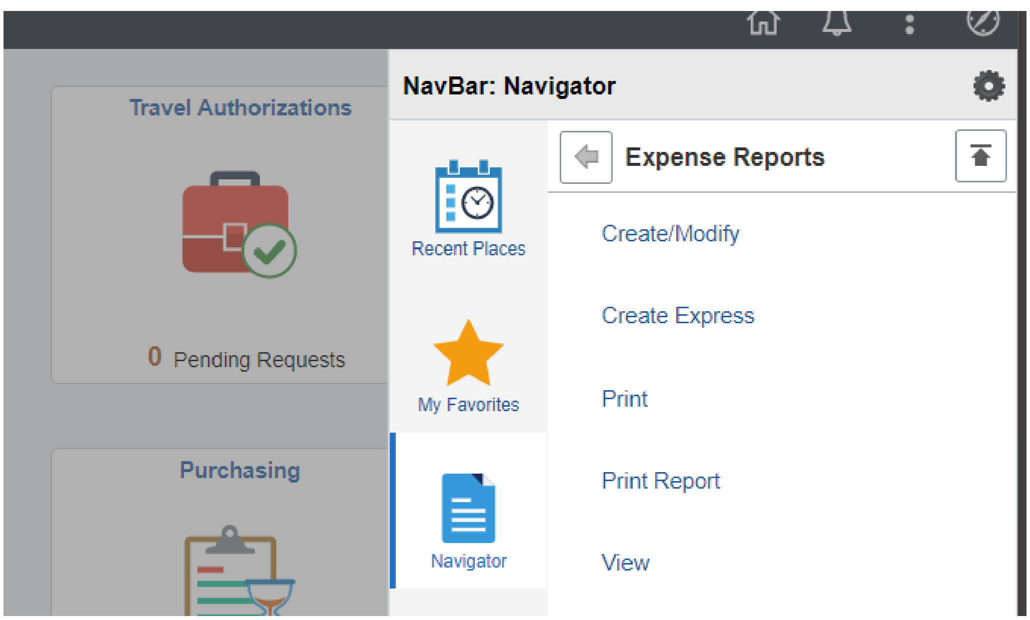
After logging in, follow these steps:

From the FIS Home menu, select

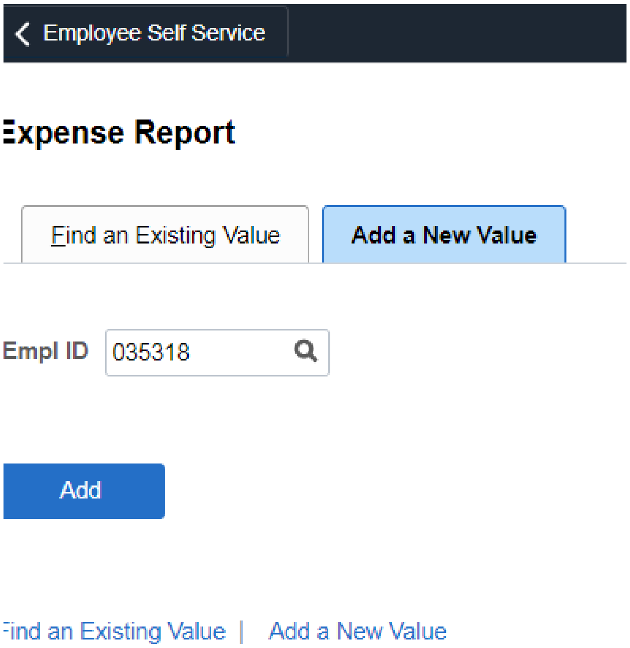
- Nav Bar, clock icon, on far right



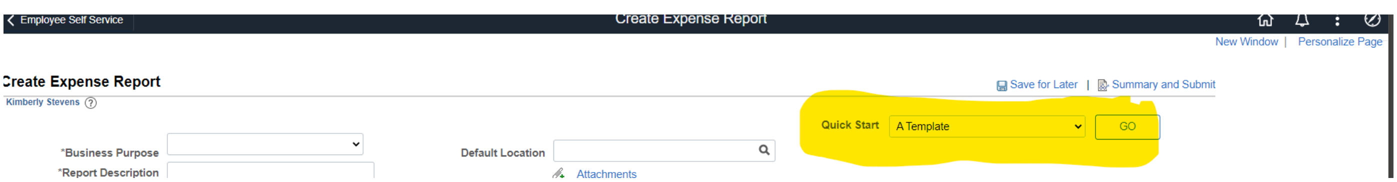
- Select blue **Navigator** button >Employee Self Service > Travel and Expenses > Expenses > **Create/Modify**



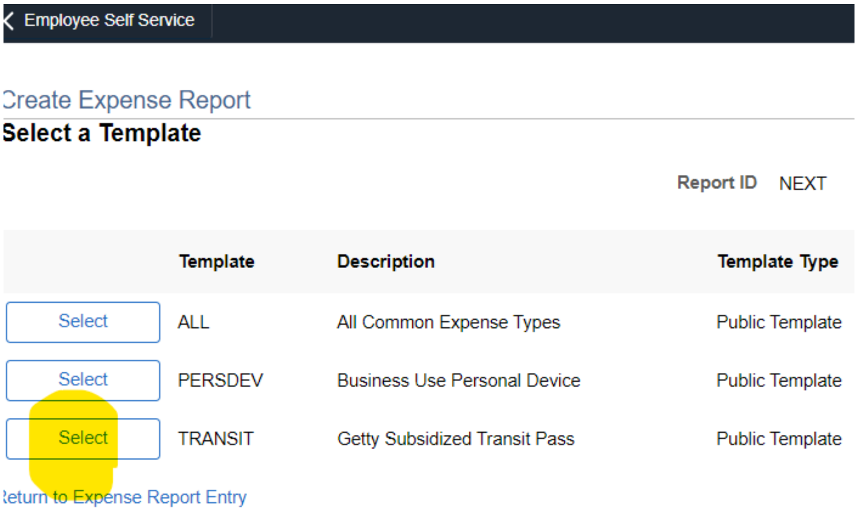
➢ Enter/confirm your employee ID and click **Add**.



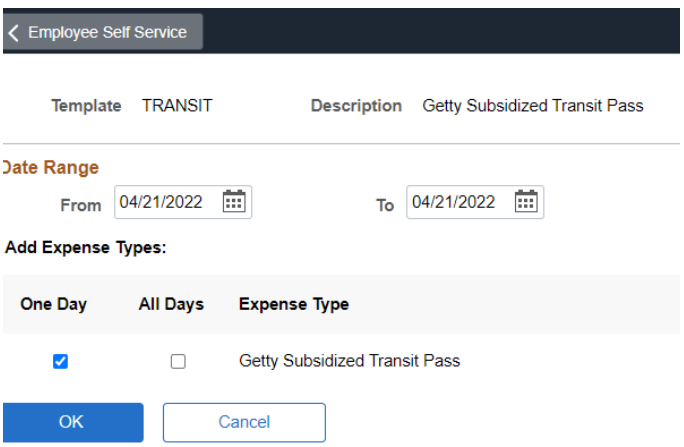
➢ From the **Quick Start** menu in top right, select **A Template** (from drop-down menu) and click **GO**.



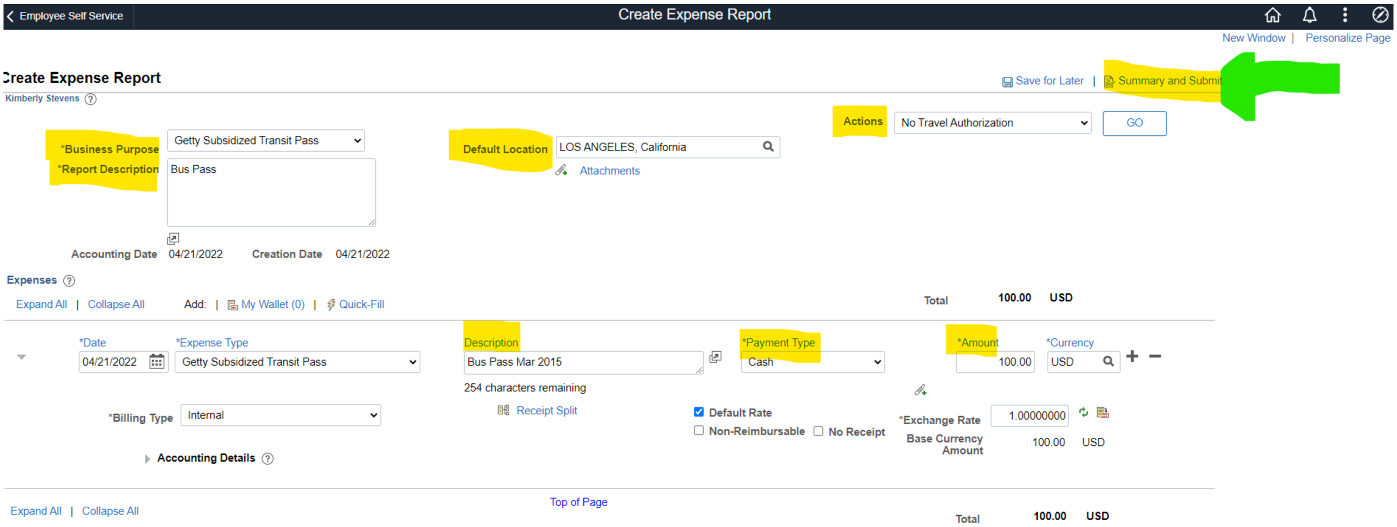
➢ Click **Select** to the left of the **Transit** Getty Subsidized Transit Pass

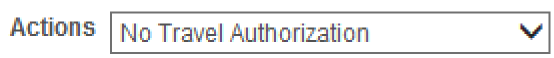
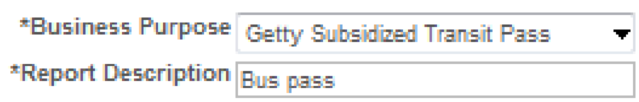
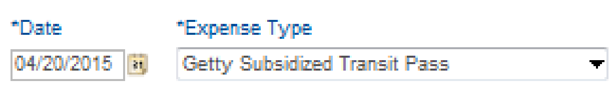
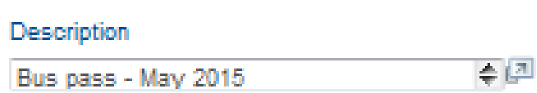


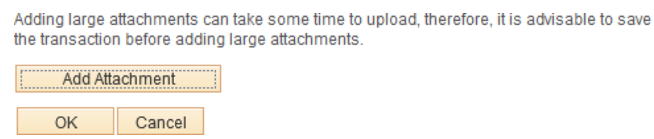
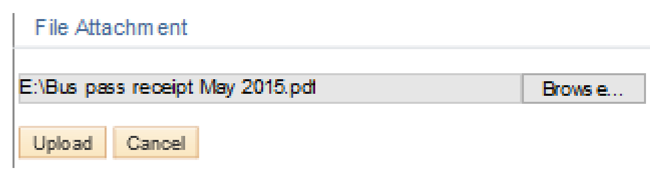
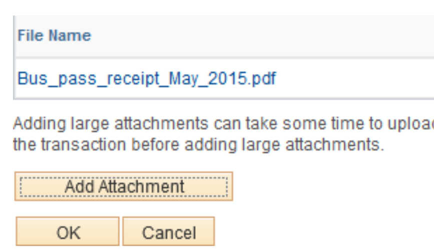
- Enter the receipt date in both **From** and **To**. Select **One Day** and click **OK**.

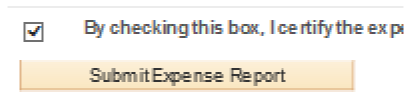


- The **Create Expense Report** screen displays. Please confirm or enter/select the highlighted information. See additional details below.



• **Actions** (upper right): Select *No Travel Authorization*.	
• **Business Purpose**: Select *Getty Subsidized Transit Pass*. • **Report Description**: Enter *Bus pass.*	
• **Default Location** – select *LOS ANGELES, California*. Quick tip: Type "Los" and selection will display.	
• **Date**: Enter or select the date the pass was purchased. If you purchased multiple passes at one time, you only need a single line. • **Expense Type**: Select *Getty Subsidized Transit Pass.*	
• **Description**: Enter *Bus pass* plus *month and year*, e.g. *Bus pass - May 2015.*	
• **Payment Type** – select ***Cash*** from menu. Always select ***Cash*** regardless of how you actually paid for the bus pass. • **Amount** – Enter amount.	

Receipt	
A receipt is required for all Getty subsidized transit passes, regardless of the amount. Please either scan and attach a receipt OR send the receipt with a copy of your expense report to HR Benefits. Following are instructions to scan and attach your receipt. If you are mailing your receipt, skip this section and go directly to **Submit for Approval**.	
Scan and Attach a Receipt (optional)	
Click the **Attachments** hyperlink under the Default Location field.	
Click the **Add Attachment** button.	
Click **Browse** and select your file.	
After selecting your file, click **Upload**.	
The file name of the uploaded receipt displays. If you have additional receipts to attach, click **Add Attachment** and follow the same steps as above. Otherwise, click **OK**.	
Submit for Approval	
When you have completed the Create Expense Report screen, click **Save for Later,** in the upper right.	

<table>
<tr>
<td>At the lower left of the Summary and Submit screen, select the checkbox to certify that your expenses are accurate and in compliance with expense policy, and then click the Submit Expense Report button.</td>
<td>
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