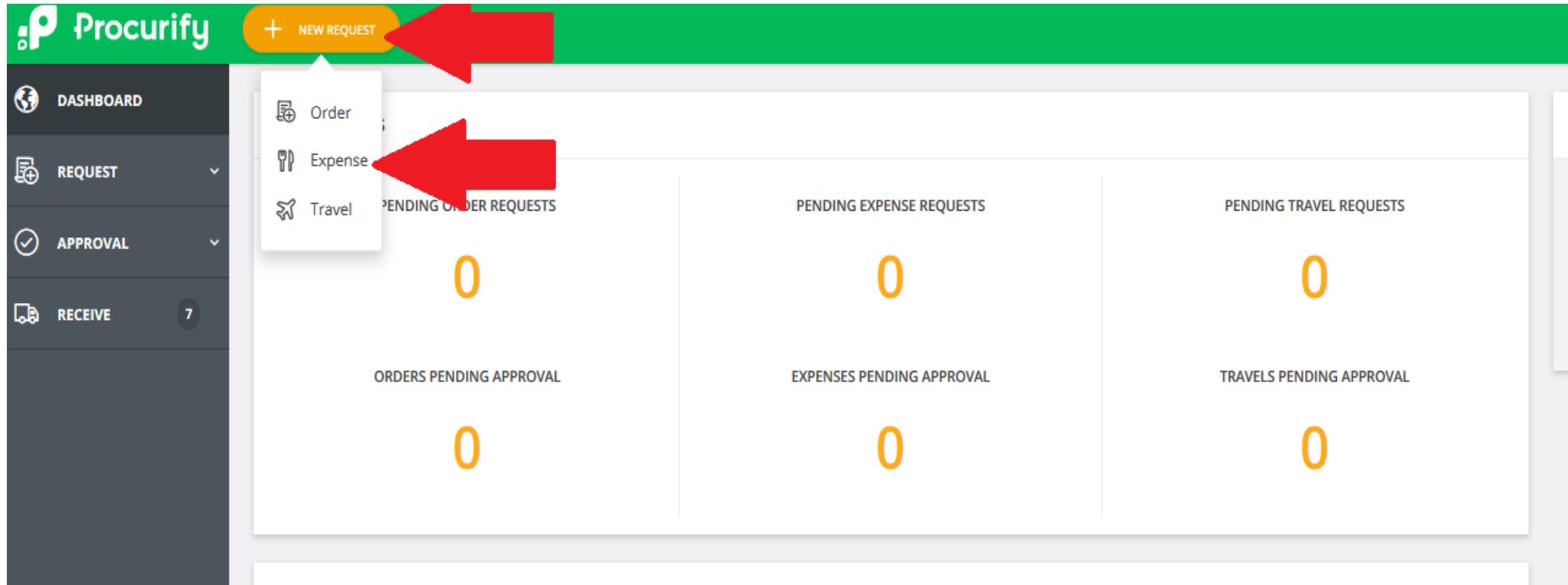


Welcome to Procurify

**STEP BY STEP INSTRUCTIONS
FOR BUSINESS EXPENSE REIMBURSEMENT**



1. To begin a new request, follow the arrows above. For day to day mileage submissions select “Expense”.

*Travel will be used for professional development pre-approval and reimbursement inclusively, and not for day to day mileage.

The screenshot shows the 'EXPENSE STATUS > CREATE NEW EXPENSE REPORT' page in the Procurify system. The 'EXPENSE REPORT INFORMATION' section contains the following fields:

- TITLE***: A text input field containing 'September 2020 Mileage'. A red arrow points to this field.
- LOCATION @***: A dropdown menu with 'Teen Health' selected. A red arrow points to this field.
- DEPARTMENT @***: A dropdown menu with 'General Clinic' selected. A red arrow points to this field.
- TRAVEL TICKET**: A dropdown menu with the placeholder text 'Select a travel ticket.'.
- PURPOSE**: A large text area with the placeholder text 'Purpose'.

At the bottom right of the form, there is a yellow button labeled '+ ADD EXPENSE ITEM'. A large red arrow points to this button.

2. Enter the period of the mileage claim, location and department. To begin click on “Add Expense Item”.

+ ADD EXPENSE ITEM

EXPENSES

YES Need Reimbursement

 FILE	VENDOR NAME * Vendor name	DATE * 10/02/2020	ACCOUNT CODE * Please select an option	AMOUNT * 0.00	CURRENCY * CAD
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SUBTOTAL: 0.00 CAD
TAX : 0.00

TOTAL EXPENSE: 0.00 CAD
REIMBURSABLE: 0.00 CAD

NEXT APPROVER *
Nadine Manroe (level 1)
Teen Health

3. Click on ellipsis “...” to add the first entry.

Procurify + NEW REQUEST

LOCATION: Teen Health DEPARTMENT: General Clinic

PURPOSE: Purpose

EXPENSES + ADD EXPENSE ITEM

Need Reimbursement

VENDOR NAME *	DATE *	ACCOUNT CODE *	AMOUNT *
Vendor name	10/02/2020	Please select an option	0.00

Actions: Edit Expense Line, Duplicate Expense Line, Remove Expense Line

SUBTOTAL: 0.00 CAD
TAX: 0.00
TOTAL EXPENSE: 0.00 CAD
REIMBURSABLE: 0.00 CAD

NEXT APPROVER: Nadine Marrois (Level 1) Teen Health

4. Click on “Edit Expense Line”.

NEW EXPENSE ITEM

NEED REIMBURSEMENT*
 YES

VENDOR NAME*

DATE*

ACCOUNT CODE*

NOTES

ADD PHOTO

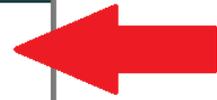
Subtotal CAD

Tax Tax %

Total Cost CAD

CANCEL SAVE

Other



NEW EXPENSE ITEM

NEED REIMBURSEMENT*
 YES

VENDOR NAME*

DATE*

ACCOUNT CODE*

NOTES

ADD PHOTO

Expense Type
Select your expense from the list below

AIRFARE LABOUR LODGING

MEALS MILEAGE OTHER

CANCEL SAVE

Other



5. Click on “Other” to toggle between mileage, meals, other, etc.

NEW EXPENSE ITEM [X]

NEED REIMBURSEMENT*
 YES

Mileage

VENDOR NAME* Jane Doe

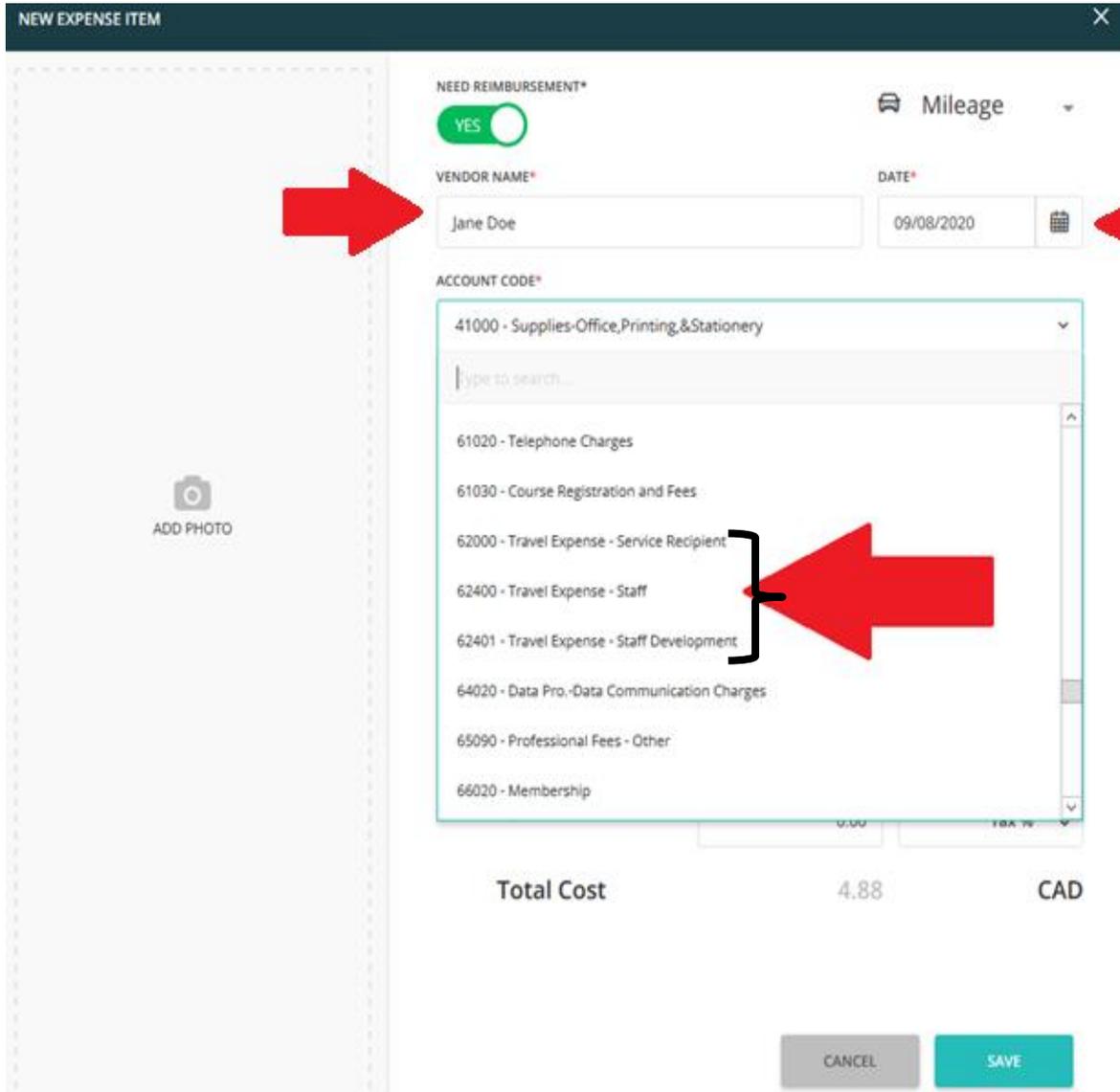
DATE* 09/08/2020

ACCOUNT CODE*

- 41000 - Supplies-Office,Printing,&Stationery
- Type to search...
- 61020 - Telephone Charges
- 61030 - Course Registration and Fees
- 62000 - Travel Expense - Service Recipient
- 62400 - Travel Expense - Staff
- 62401 - Travel Expense - Staff Development
- 64020 - Data Pro.-Data Communication Charges
- 65090 - Professional Fees - Other
- 66020 - Membership

Total Cost 4.88 CAD

CANCEL SAVE



6. Enter your name and date of travel. Based on the travel type, select one of the three travel codes:

62000 – Travel related to any client care such as home visits, point of service delivery, etc.

62400 – General day to day travel such as site to site, meetings, etc.

62401 – Travel related to professional development.

NEW EXPENSE ITEM [X]

NEED REIMBURSEMENT* YES

Mileage [v]

VENDOR NAME* [Jane Doe] DATE* [09/08/2020]

ACCOUNT CODE* [62400 - Travel Expense - Staff]

NOTES [Teen to Diabetes Wellness]

Mileage Rate * [0.53] [CAD]

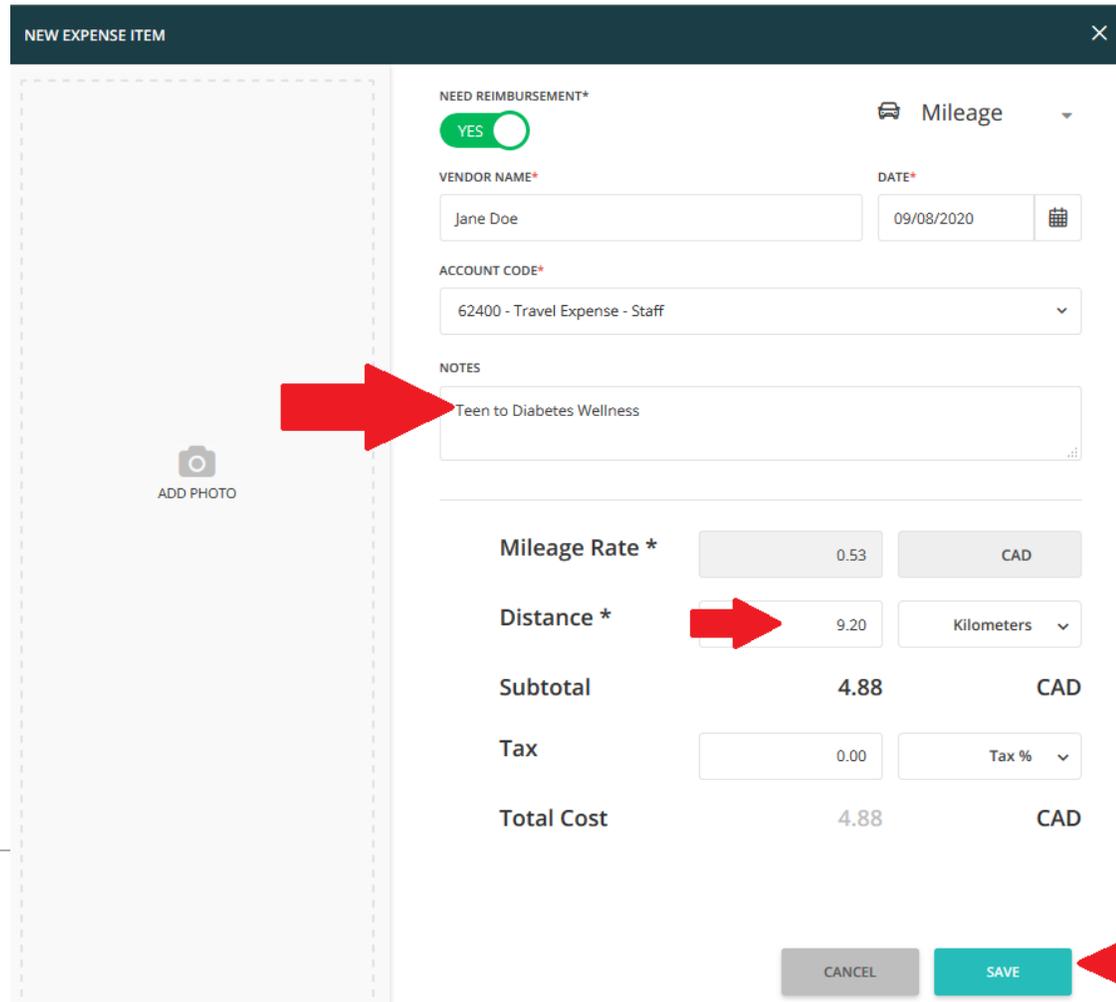
Distance * [9.20] [Kilometers]

Subtotal 4.88 CAD

Tax [0.00] [Tax %]

Total Cost 4.88 CAD

[CANCEL] [SAVE]



7. Enter notes related to travel and distance in kilometers. Click save.

EXPENSES

 + ADD EXPENSE ITEM

Need Reimbursement ...

	VENDOR NAME * Jane Doe	DATE * 09/08/2020	ACCOUNT CODE* 62400 - Travel Expense - Staff	AMOUNT* 4.88	CURRENCY* CAD
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Need Reimbursement ...

New Row  

	Vendor name	DATE * 10/04/2020	ACCOUNT CODE* Please select an option	AMOUNT* 0.00	CURRENCY* CAD
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8. To add next entry click “Add Expense Item” and select ellipsis “...” and follow steps as outlined in prior slides.

EXPENSES + ADD EXPENSE ITEM

Need Reimbursement ...

VENDOR NAME * Jane Doe **DATE *** 09/08/2020 **ACCOUNT CODE *** 62400 - Travel Expense - Staff **AMOUNT *** 4.88 **CURRENCY *** CAD

SUBTOTAL:	4.88	CAD
TAX :	0.00	
TOTAL EXPENSE:	4.88	CAD
REIMBURSABLE:	4.88	CAD

NEXT APPROVER *
Nadine Manroe (level 1)
Teen Health

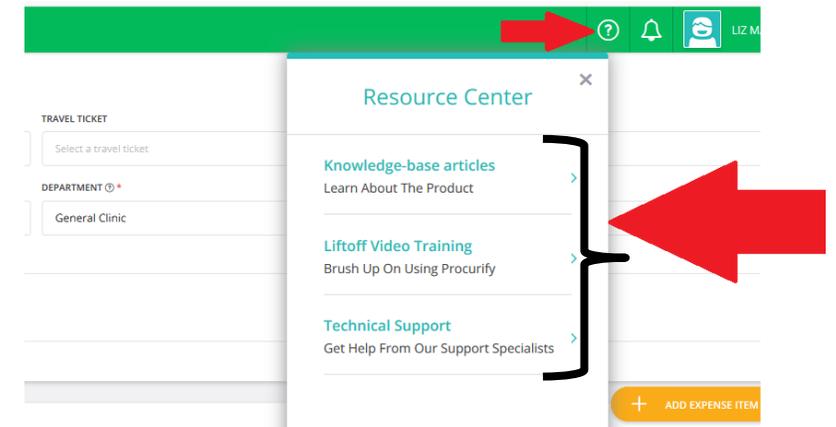
9. “Save Draft” allows you to enter your day to day travel as it occurs. Once your monthly expenses are completed click “Submit” for approval.

Help and Support

Several resources are available within Procurify for additional help which can be accessed at the top right hand corner of the home screen.

It includes the following:

- Knowledge-Base Articles
- Liftoff Video Training
- Technical Support



For all other inquiries a procurement helpdesk ticket must be submitted within the weCHC internal staff portal.