

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.



Procurify			(?) 🗘 🚊 LIZ MAGRO
G DASHBOARD	EXPENSE STATUS > CREATE NEW EXPENSE REPORT		
🧭 APPROVAL	EXPENSE REPORT INFORMATION		
RECEIVE 7	TITLE *	TRAVEL TICKET	
	September 2020 Mileage	Select a travel ticket	~
		DEPARTMENT () *	
	Teen Health	General Clinic	¥
	PURPOSE		
			+ ADD EXPENSE ITEM
	ENDENCES		_

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

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				WeC	HC
				Health Des soins de so	care for
				+ ADD EXPEN	
ENSES					
YES Need Reimbursement					
VENDOR NAME *	DATE *	ACCOUNT CODE*	AMOUNT*	CURRENCY*	
FILE Vendor name	10/02/2020	Please select an option	•	0.00 CAD	~
			SUBTOTAL:	0.00	CAD
			TAX :	0.00	
			TOTAL EXPENSE:	0.00	CAD
			REIMBURSABLE:	0.00	CAD
			NEXT APPROVER *		

Nadine Manroe (level 1) Teen Health

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3. Click on ellipsis "..." to add the first entry.



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						+ ADD EXPENSE (
		EXPENSES					_
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		VENDOR NAME *	DATE *	Please select an option	AMOUNT*	O Duplicate Expense 1 0.00	Line
						Remove Expense Lin	•
					SUBTOTAL:	0.00	CAD
					TAX :	0.00	
					TOTAL EXPENSE:	0.00	CAD
					REIMBURSABLE:	0.00	CAD
:6	p				NEXT APPROVER * Nadine Manroe (level 1)		
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4. Click on "Edit Expense Line".



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				^		NEW EXPENSE ITEM	NEW EXPENSE ITEM	NEW EXPENSE ITEM	NEW EXPENSE ITEM	NEW EXPENSE ITEM	NEW EXPENSE ITEM	NEW EXPENSE ITEM	NEW EXPENSE ITEM
	NEED REIMBURSEMENT*	Q	🕴 Other 🚽				NEED REIMBURGEMENT*					NEED REIMBURGEMENT* Ø Other	
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			10/02/2020				Vertice Name	Verdor Name 10/02/20	Vender Name 10/02/2020	Verdor Name 10/02/2020	Vender Name 10/02/2020	Verder Name 10/02/2020	Verdor Name 10/02/2020
	ACCOUNT CODE*						ACCOUNT CODE*						
	Account Code *		~				Select your ext	Select your expense from the list below					
	NOTES						NOTES	NOTES	NOTES	NOTES	NOTES	NOTES	NOTES
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ADD PHOTO						ADD PHOTO	ADD PHOTO						
	Subtotal	0.00	CAD 🗸				Subtotal	Subtotal	Subtotal 0.00	Subtotal 0.00		Subtotal 0.00 CAD	Subtotal 0.00 cab -
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	Тах	0.00	Tax % 🗸										
	Total Cost	0	CAD										
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							MEALS	MEALS MILEAGE OTHE	MEALS MILEAGE OTHER				
								CANCEL	CANCEL	CANCEL 54	CANCEL SAV	CANCEL SAVE	CANCEL SAVE
		CANCEL	SAVE										

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

NEW EXPENSE ITEM **NEED REIMBURSEMENT*** A Mileage YES DATE* VENDOR NAME 曲 09/08/2020 Jane Doe ACCOUNT CODE* 41000 - Supplies-Office, Printing, & Stationery lype to search 61020 - Telephone Charges 0 61030 - Course Registration and Fees ADD PHOTO 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

Windsor Essex Community Health Centre Centre de santé communautaire de Windsor Essex Weener Healthcare for You Des soins de santé pour vous

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.

LOD PHOTO NOTES Tent D Dubetes Wellness Mileage Rate * 0,03 COD Distance * 9,00 Xubtotal 1,4.88 CAD Tax 0,00 Xubtotal	NEW EXPENSE ITEM				×	Windsor Essex Community Health Centre Centre de santé communautaire de Windsor Essex
VENDER NAME* Jane Doe ACCOUNT CODE* C2400 - Travel Expense - Staff Teen to Diabetes Wellness Mileage Rate * 0.53 CAD Distance * 9.20 Kilometers ~ Subtotal 4.88 CAD Tax 0.00 Tax 5 and 5		NEED REIMBURSEMENT*	e	⇒ Mileage	Ŧ	Wechc Healthcore for You
Jane Doe ACCOUNT CODE* 62400 - Travel Expense - Staff Teen to Diabetes Wellness Mileage Rate * 0.53 CAD Distance * 9.20 Kilometers ~ Subtotal 4.88 CAD TaX 0.00 Texts ref		VENDOR NAME*	D	ATE*		Des soins de santé pour vous
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Tax 000 Tax 6		Subtotal	4.88	(CAD	
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Total Cost 4.88 CAD		Total Cost	4.88	(CAD	
				_		
CANCEL SAVE			CANCEL	SAVE		

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



EXPENSES							+ ADD EXPENS	SE ITEM
YES	Need Reimbursement							
	VENDOR NAME *	DATE *		ACCOUNT CODE*	AMOUNT*		CURRENCY*	
FILE	Jane Doe	09/08/2020	iii (62400 - Travel Expense - Staff 🗸 🗸		4.88	CAD	~
YES	Need Reimbursement							•••
	New Row	DATE *		ACCOUNT CODE*	AMOUNT*		CURRENCY*	
FILE	Vendor name	10/04/2020		Please select an option		0.00	CAD	*

8. To add next entry click "Add Expense Item" and select ellipsis "..." and follow steps as outlined in prior slides.



EXPENSES								NSETTEM
YES	Need Reimbursement							
	VENDOR NAME *	DATE *		ACCOUNT CODE*	AMOUNT*		CURRENCY*	
FILE	Jane Doe	09/08/2020	曲	62400 - Travel Expense - Staff	~	4.88	CAD	~
				S T - T B	SUBTOTAL: TAX : FOTAL EXPENSE: REIMBURSABLE:		4.88 0.00 4.88 4.88	CAD CAD
				N	IEXT APPROVER *		4.00	cho
					Nadine Manroe (level 1) Teen Health	-		
						RESET FORM	/E DRAFT	SUBMIT

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.