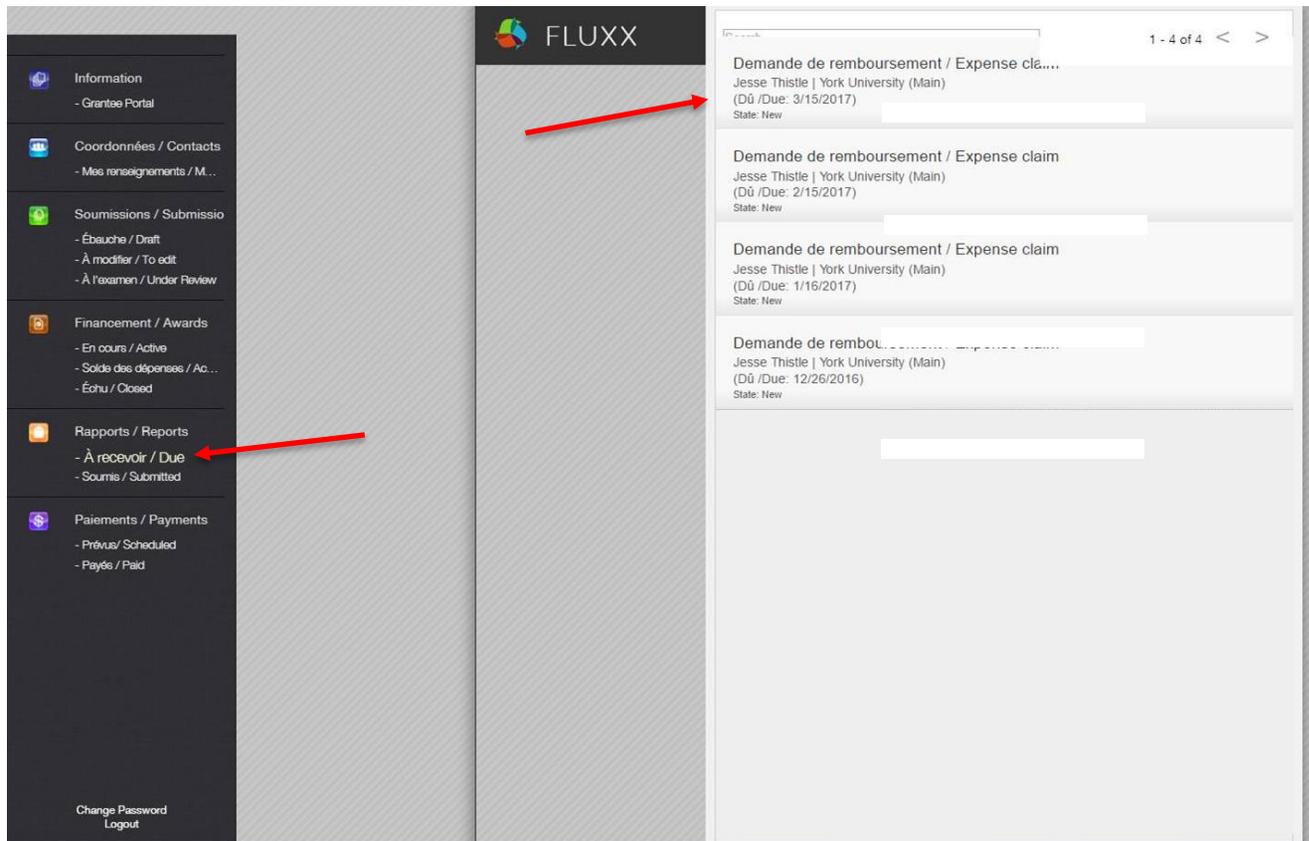


Easy step by step manual

How to submit an expense claim

IMPORTANT – Always use CHROME as your internet navigator to have the best results with the portal.

1. On the left side, you have several tabs
2. Under the “Rapports/Reports” tabs
3. Find “À recevoir/Due”
4. Then you will find the following:



The screenshot displays the FLUXX portal interface. On the left, a dark sidebar contains several menu items: Information (Grantee Portal), Coordonnées / Contacts (Mes renseignements / M...), Soumissions / Submissio (Ébauche / Draft, À modifier / To edit, À l'examen / Under Review), Financement / Awards (En cours / Active, Solde des dépenses / Ac..., Échu / Closed), Rapports / Reports (À recevoir / Due, Soumis / Submitted), and Paiements / Payments (Prévus / Scheduled, Payés / Paid). At the bottom of the sidebar are links for Change Password and Logout. The main content area features the FLUXX logo at the top left. Below it, a list of expense claims is shown, with a red arrow pointing to the 'À recevoir / Due' sub-item in the sidebar. The list contains four entries, each with the title 'Demande de remboursement / Expense cla...', the user 'Jesse Thistle | York University (Main)', and a due date: 3/15/2017, 2/15/2017, 1/16/2017, and 12/26/2016. All entries are marked as 'State: New'. A red arrow also points to the top of the main content area.

5. This page will appear once you click on one of the expense claims

The screenshot displays the FLUXX web application interface. On the left is a dark sidebar with navigation links: Information (Grantee Portal), Coordonnées / Contacts (Mes renseignements / M...), Soumissions / Submissio (Ébauche / Draft, À modifier / To edit, À l'examen / Under Review), Financement / Awards (En cours / Active, Solde des dépenses / Ac..., Échu / Closed), Rapports / Reports (À recevoir / Due, Soumis / Submitted), and Paiements / Payments (Prévus / Scheduled, Payés / Paid). At the bottom of the sidebar are links for Change Password and Logout.

The main content area features the FLUXX logo at the top left. At the top right are buttons for Edit, Delete, Printable, and Soumettre / Submit. The page title is FONDATION PIERRE ELLIOTT TRUDEAU FOUNDATION. Below this, the form fields for Nom / Name and Dé / Due (3/15/2017) are visible. The main text area contains instructions in French regarding downloading and submitting expense claim forms, and lists links for Bourses, Mentorat, and Prix. A DOCUMENTS section with a green plus icon is located below the text. At the bottom, there are two paragraphs of English instructions: "Please download the appropriate version of our PIP and Research expense form templates available here and complete them to submit an expense claim form..." and "When you have completed the upload, enter your name in the signature field below to verify that they are in compliance with the Foundation's policies, save and submit for processing."

- 6. You will need to choose one of the links in blue and
- 7. An Excel sheet will appear on the left bottom corner

The screenshot shows the FLUXX web application interface. On the left is a dark sidebar with navigation menus. The main content area on the right contains instructions and links for downloading expense claim forms. A red arrow points from the 'Soumettre / Submit' button to the 'DOCUMENTS' upload area. Another red arrow points from the 'Change Password / Logout' link in the sidebar to the bottom taskbar, which shows an Excel file named '2016-17_ata_pip_s...xlsx'.

FLUXX

← Edit Delete Printable Soumettre / Submit

Please download the appropriate version of our PIP and Research expense form templates available here and complete them to submit an expense claim form. When you have finished the form, please upload it in the document component below by clicking the green + icon, and adding the file.

When you have completed the upload, enter your name in the signature field below to verify that they are in compliance with the Foundation's policies, save and submit for processing.

Scholarships
[PIP Expense claim form \(short\)](#)
[PIP expense claim form \(long\)](#)
[Research expense claim form \(short\)](#)
[Research expense claim form \(long\)](#)

Mentorship
Expense claim form

Fellowship
Expense claim form

Travel Policy
[Per Diem Allowances - Other countries](#)
Note: The Foundation applies rates suggested by the National Joint Council of the Public Service of Canada for travel outside Canada and the U.S.
[Bank of Canada currency converter](#)

DOCUMENTS +

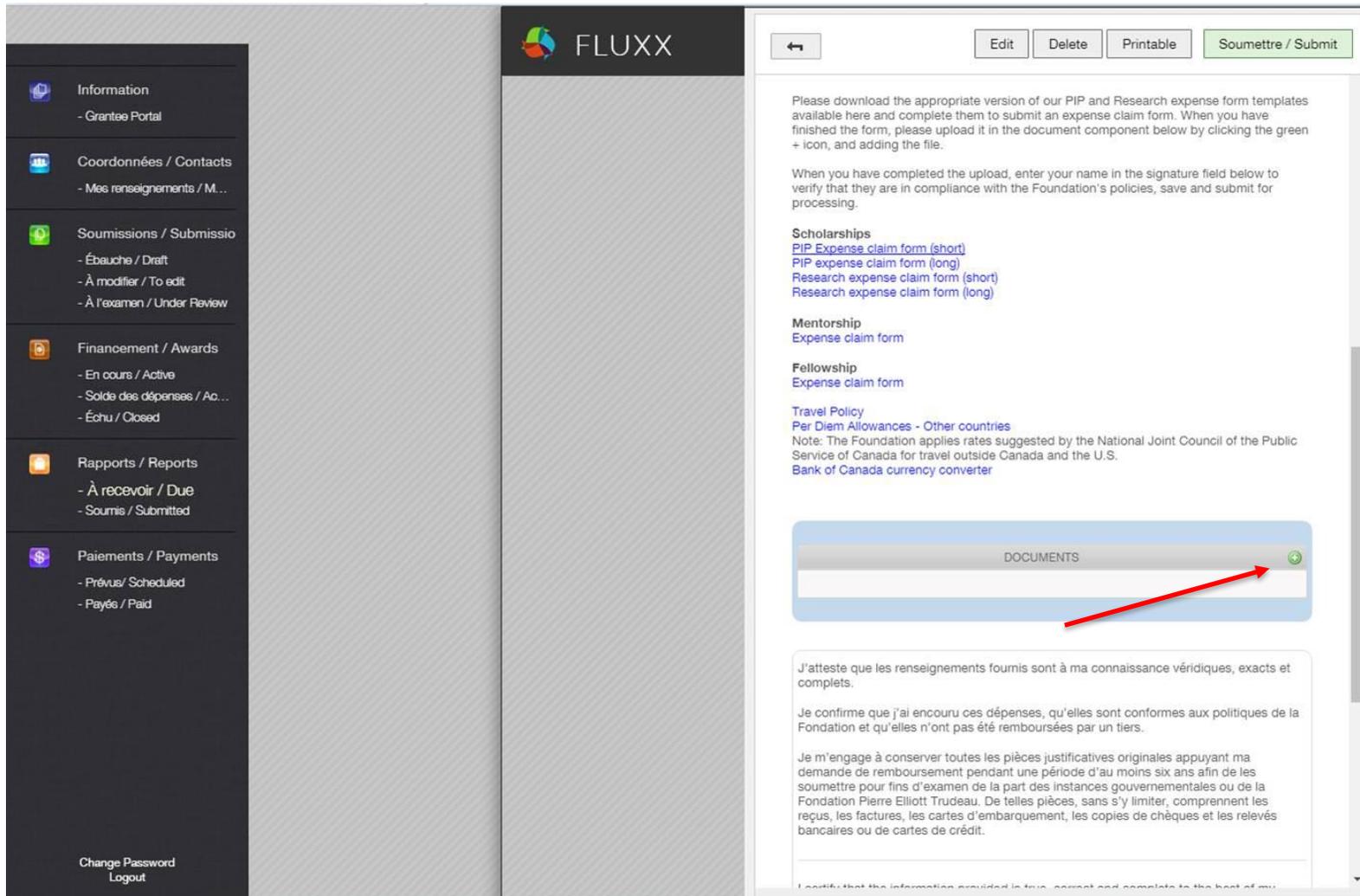
J'atteste que les renseignements fournis sont à ma connaissance véridiques, exacts et complets.

Je confirme que j'ai encouru ces dépenses, qu'elles sont conformes aux politiques de la Fondation et qu'elles n'ont pas été remboursées par un tiers.

Je m'engage à conserver toutes les pièces justificatives originales appuyant ma demande de remboursement pendant une période d'au moins six ans afin de les soumettre pour fins d'examen de la part des instances gouvernementales ou de la Fondation Pierre Elliott Trudeau. De telles pièces, sans s'y limiter, comprennent les reçus, les factures, les cartes d'embarquement, les copies de chèques et les relevés bancaires ou de cartes de crédit.

2016-17_ata_pip_s...xlsx ^

9. You will then return in your portal and attach this Excel sheet by clicking on the green “+” sign in the box DOCUMENTS
10. You will then take each invoice, tape them on a white sheet by chronological order and scan this sheet. Don’t forget to SAVE it in your computer.
11. You will then add this sheet the same way you added the Excel sheet, “+” in the box DOCUMENTS



12. To be able to submit your expense claim you will need to “agree” and “sign” the form.
- a. To do so, you will need to press on “EDIT” on the top of the page

FLUXX

Information
- Grantee Portal

Coordonnées / Contacts
- Mes renseignements / M...

Soumissions / Submissio
- Ébauche / Draft
- À modifier / To edit
- À l'examen / Under Review

Financement / Awards
- En cours / Active
- Solde des dépenses / Ac...
- Échu / Closed

Rapports / Reports
- À recevoir / Due
- Soumis / Submitted

Paiements / Payments
- Prévus / Scheduled
- Payés / Paid

Change Password
Logout

← Edit Delete Printable Soumettre / Submit

[Per Diem Allowances - Other countries](#)
Note: The Foundation applies rates suggested by the National Joint Council of the Public Service of Canada for travel outside Canada and the U.S.
[Bank of Canada currency converter](#)

DOCUMENTS

J'atteste que les renseignements fournis sont à ma connaissance véridiques, exacts et complets.

Je confirme que j'ai encouru ces dépenses, qu'elles sont conformes aux politiques de la Fondation et qu'elles n'ont pas été remboursées par un tiers.

Je m'engage à conserver toutes les pièces justificatives originales appuyant ma demande de remboursement pendant une période d'au moins six ans afin de les soumettre pour fins d'examen de la part des instances gouvernementales ou de la Fondation Pierre Elliott Trudeau. De telles pièces, sans s'y limiter, comprennent les reçus, les factures, les cartes d'embarquement, les copies de chèques et les relevés bancaires ou de cartes de crédit.

I certify that the information provided is true, correct and complete to the best of my knowledge.

I hereby certify I have incurred these expenditures, that they are in compliance with Foundation policies and that I have not asked that they be reimbursed by a third party.

I undertake to retain all original documentation supporting my request for reimbursement for a period of at least six years in the event that I am asked to submit it to government authorities or to the Pierre Elliott Trudeau Foundation for review. Such documents, without limitation, include receipts, invoices, boarding passes, copies of cheques, and bank or credit card statements.

⚠ J'accepte / I agree must be checked
⚠ Signature is required

J'accepte / I agree:
Signature:

a. Then scroll down to click on the agree box and type your name for your signature

FLUXX

Information
- Grantee Portal

Coordonnées / Contacts
- Mes renseignements / M...

Soumissions / Submissio
- Ébauche / Draft
- À modifier / To edit
- À l'examen / Under Review

Financement / Awards
- En cours / Active
- Solde des dépenses / Ac...
- Échu / Closed

Rapports / Reports
- À recevoir / Due
- Soumis / Submitted

Paiements / Payments
- Prévus / Scheduled
- Payés / Paid

Change Password
Logout

Cancel Save

[Travel Policy](#)
[Per Diem Allowances - Other countries](#)
Note: The Foundation applies rates suggested by the National Joint Council of the Public Service of Canada for travel outside Canada and the U.S.
[Bank of Canada currency converter](#)

DOCUMENTS

J'atteste que les renseignements fournis sont à ma connaissance véridiques, exacts et complets.

Je confirme que j'ai encouru ces dépenses, qu'elles sont conformes aux politiques de la Fondation et qu'elles n'ont pas été remboursées par un tiers.

Je m'engage à conserver toutes les pièces justificatives originales appuyant ma demande de remboursement pendant une période d'au moins six ans afin de les soumettre pour fins d'examen de la part des instances gouvernementales ou de la Fondation Pierre Elliott Trudeau. De telles pièces, sans s'y limiter, comprennent les reçus, les factures, les cartes d'embarquement, les copies de chèques et les relevés bancaires ou de cartes de crédit.

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J'accepte / I agree must be checked
 Signature is required

J'accepte / I agree

Signature

a. Then press "SAVE"

The screenshot shows the FLUXX web application interface. On the left is a dark sidebar with navigation options: Information (Grantee Portal), Coordonnées / Contacts (Mes renseignements / M...), Soumissions / Submissio (Ébauche / Draft, À modifier / To edit, À l'examen / Under Review), Financement / Awards (En cours / Active, Solde des dépenses / Ac..., Échu / Closed), Rapports / Reports (À recevoir / Due, Soumis / Submitted), and Paiements / Payments (Prévus / Scheduled, Payés / Paid). At the bottom of the sidebar are links for Change Password and Logout.

The main content area is titled "Travel Policy" and "Per Diem Allowances - Other countries". It includes a note: "Note: The Foundation applies rates suggested by the National Joint Council of the Public Service of Canada for travel outside Canada and the U.S." and a link for "Bank of Canada currency converter".

Below the note is a "DOCUMENTS" section with a plus icon for adding documents. The form contains three paragraphs of text in French and English, followed by a red warning box with two error messages: "J'accepte / I agree must be checked" and "Signature is required". At the bottom, there is a checkbox for "J'accepte / I agree" and a "Signature" field with an empty input box.

At the top right of the form, there are three buttons: "Cancel", "Save" (circled in red), and a small green button with a checkmark.

Once you have done all that you are ready to SUBMIT your expense claim
13. SUBMIT button can be found on the Top RIGHT side of your portal

The screenshot displays the FLUXX portal interface. On the left is a dark sidebar with navigation options: Information (Grantee Portal), Coordonnées / Contacts (Mes renseignements / M...), Soumissions / Submissio (Ébauche / Draft, À modifier / To edit, À l'examen / Under Review), Financement / Awards (En cours / Active, Solde des dépenses / Ao..., Échu / Closed), Rapports / Reports (À recevoir / Due, Soumis / Submitted), and Paiements / Payments (Prévus / Scheduled, Payés / Paid). At the bottom of the sidebar are 'Change Password' and 'Logout' links. The main content area has a header with the FLUXX logo and a navigation bar with buttons for 'Edit', 'Delete', 'Printable', and 'Soumettre / Submit'. A red arrow points to the 'Soumettre / Submit' button. Below the navigation bar, there is instructional text in French and English, followed by links for 'Scholarships' (PIP Expense claim form (short), PIP expense claim form (long), Research expense claim form (short), Research expense claim form (long)), 'Mentorship' (Expense claim form), and 'Fellowship' (Expense claim form). There is also a 'Travel Policy' section with a note about travel rates and a 'Bank of Canada currency converter' link. A 'DOCUMENTS' section is visible below, and at the bottom, there is a declaration form in French and English.

Should you have further questions regarding the portal, please do not hesitate to contact me (Catalina Chew) at support@trudeaufoundation.ca.