

How to Submit an Expense Claim

Easy step-by-step manual

For assistance, please e-mail leadership@trudeaufoundation.ca.

IMPORTANT – Use Google Chrome as your internet browser for best results in the portal.

- 1. After logging into the portal, find the "Rapports/Reports" header in the left hand menu.
- 2. Click on "À recevoir/Due"
- 3. A list of your current reports will display.



4. Choose the expense report that is due next to open it.



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- 5.
- Click on the expense report template in either French or English. An excel form will download and appear in the bottom left of your screen. 6.

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| | Demande de remboursement / Expense claim Test ScholarApplicant Test University (Dû /Due: 6/30/2019) State: New | | DEMANDE DE REMBOURSEMENT / EXPENSE CLAIM FONDATION PIERRE ELLIOTT TRUDEAU FOUNDATION | | |
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- 7. Click on the downloaded excel file and it will open as below.
- 8. Complete the form and save it to your computer in a place you will be able to locate it.

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- 9. Once you have completed and saved the excel file, return to the portal..
- 10. Make sure all of your receipts are scanned as PDF files.
- 11. Find the "Documents" box and click on the Gree \oplus

IMPORTANT – All receipts must be in PDF format.

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- Drag your receipts and the saved excel file from the location you saved them onto the text that says "Drag Files Here". Click "Start Upload".
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- 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 15.

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- 15.
- b. Then scroll down to the bottom to the signature section.
- c. Click the checkbox and type your name to sign.
- 16. Once you have signed, click "Save".

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17. Finally, click "Submit" to send your expense claim to the Foundation.

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