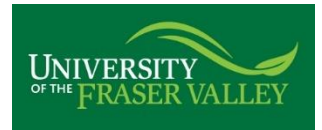


PD Claim: How to Submit PD Claim in Emburse System

Quick Reference Guide (QRG)

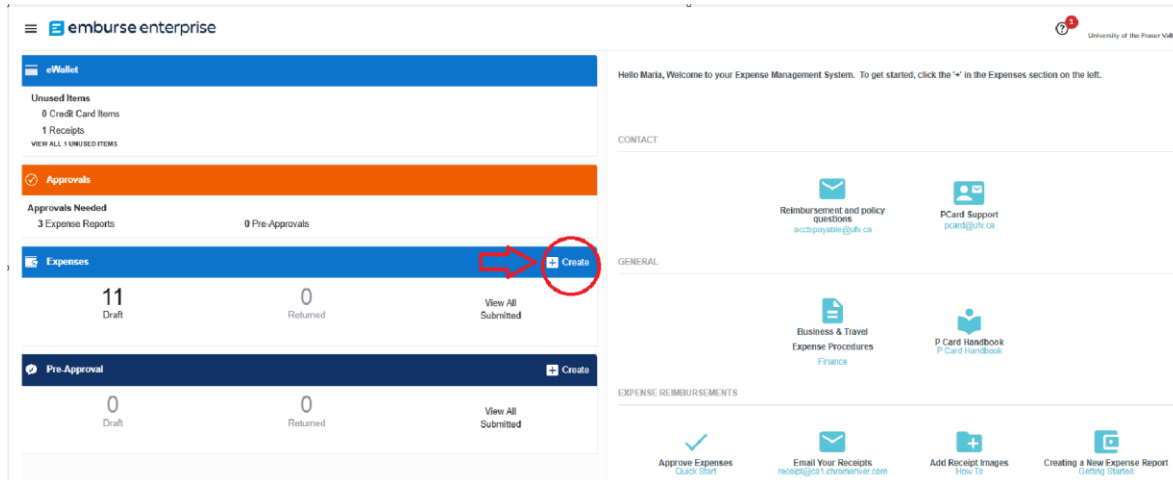


Sharing some steps/instructions and screenshots on how to submit a Professional Development (PD) claim using the Emburse system.

Emburse Enterprise Access and Instructions:

Emburse can now be accessed [here](#), and through the card in myUFV. To find the card in myUFV, click on the three lines next to the myUFV logo and select Work/Employee. If the card does not show up on the page, you can search for Emburse Enterprise EMS.

Step 1: Click the (+) Create button to create a new expense report



Step 2: The screen below will appear. In the Report Name,

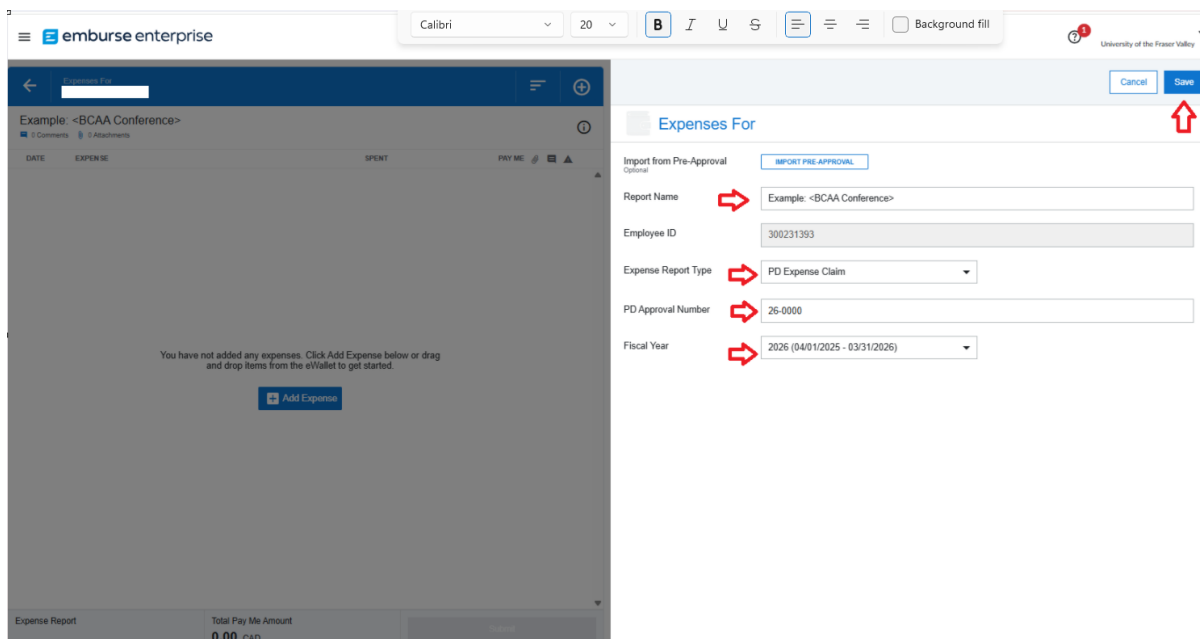
In Report Name: type “PD Activity Description”

In Expense Report Type: Select “PD Expense Claim” from the drop-down menu as shown below.

In PD Approval Number: Type the PD Approval Number/s provided to you for this PD activity you are claiming

In Fiscal Year: Select the current Fiscal Year (Example: FY 2026)

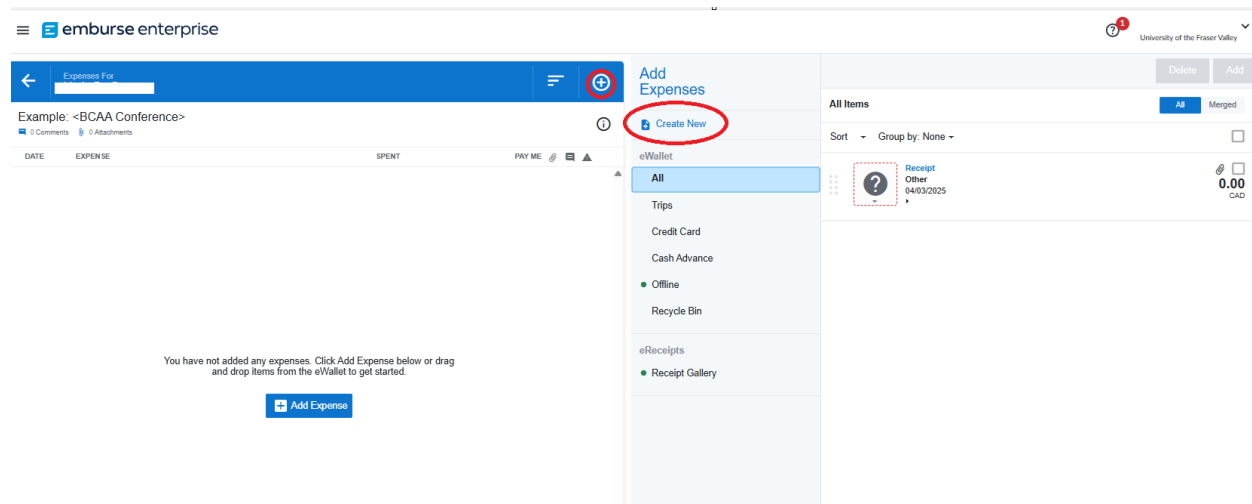
Then click “Save”



PD Claim: How to Submit PD Claim in Emburse System

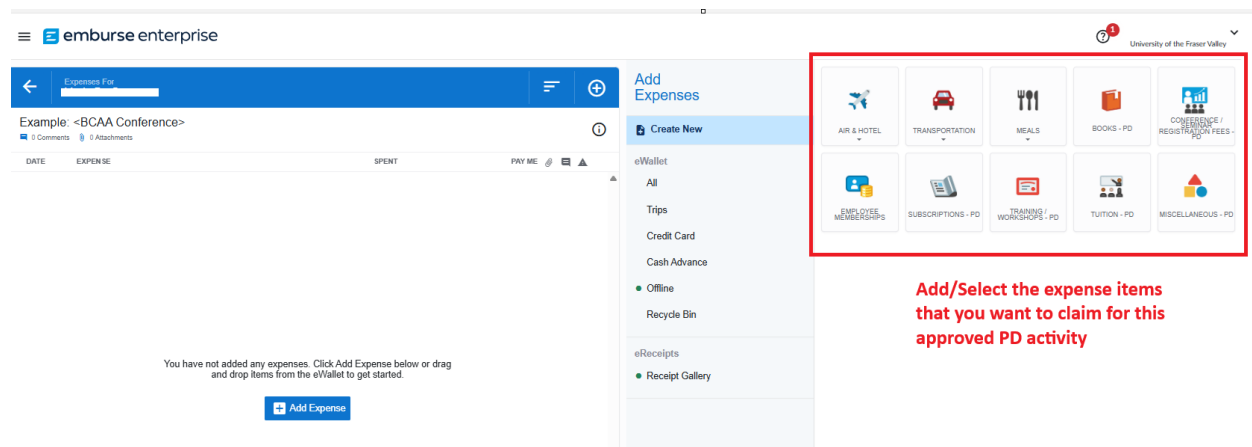
Quick Reference Guide (QRG)

Step 3: The screen below will appear. Add an expense item by either clicking the “(+)” button and/or click the “Create New” as shown below.

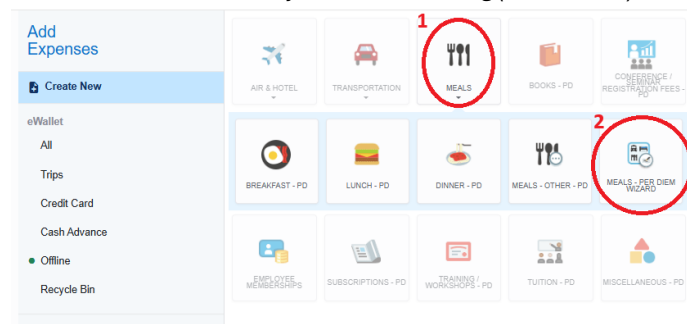


Step 4: Select the expense line item that you wanted to claim for this PD Approval Number. For example, you can select “Employee Membership expense, Airfare/Hotel expenses, Books expense, etc.” as shown below.

You may need to repeat this step to add all related expenses to your approved PD number.



Note: If you are claiming for Meals per diem, please select the “Meals – Per Diem Wizard” as shown below. Then select the meals that you are not claiming (deductibles). Allocation should be: “PD Professional Development”



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Step 5: Once you selected an expense line item that you wanted to claim, for example conference expense, please fill-up the information based on your claim receipt.

Note:

- **Date and Amount Spent:** You can update these based on receipt and how much you are claiming.
- **For Location:** If your official receipt shows gst/pst Canadian taxes, the location should be set to “Canada – BC”, but if your receipt is in USD/other currencies and does not show any gst/pst Canadian taxes, please use location: “Canada – Other”. Location should be set to where the expense was made. This field determines how taxes are applied.
- **Allocation:** should be: “PD Professional Development” and add your name in the second box/field of the Allocation area for all expenses where you are the sole beneficiary of items/services purchased. Like Conference Fee, Mileage, Meals, etc.
- **Receipt Attachment:** Ensure to attach the itemized receipt showing what was paid for i.e. course name, price, any taxes, method of payment, etc. If receipt does not show the method of payment, kindly attach supporting document showing method of payment like bank statement or visa/credit card machine receipt as we must have proof of payment of all invoices submitted for reimbursement.
- **Multiple Receipts:** Add an expense item for each receipt and do not gather items under one expense item if they each have their own receipt (for example with books, even if they are the same category, if they have their own receipts they need to be separated. If you have two book receipts, there should be two books expense line items).
- **Receipt in another currency, i.e. USD, etc:** If you have your credit card statement showing how much you paid in CAD, you can edit the amount to CAD. Or you can use the USD to CAD currency system conversion rate in Emburse by changing the date to when payment was made (based on receipt) and changing the amount to USD and currency to USD. The Emburse system will automatically convert the USD amount to Cad based on exchange rate when payment was made.

Once filled out, please click “Save”. If you have multiple receipts/invoices, please repeat step 3 to 5 - to add other expense line items with different receipts that you need to claim under this PD Approval Number.

Then Review and click “Submit”.

PD Claim: How to Submit PD Claim in Emburse System

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Additional Remarks:

- *You can always check the status of your submitted claim in your Emburse system under “Submitted > Tracking” to see where it is currently at in the approval process. Please allow 2 to 3 weeks’ processing time and may take longer if there are questions/concerns/missing information.*
- *If an expense claim has been returned to you, this will go to your “Returned” folder. Please open it and perform the required actions and resubmit.*
- *To edit a claim, you may need to “Recall” your claim to edit and resubmit.*
- *If you post a comment but did not resubmit, this will not be seen by the approvers unless claim has been resubmitted for review/approval.*
- *If you have related questions, please email: In-Service_pd@ufv.ca*

Thank you.