

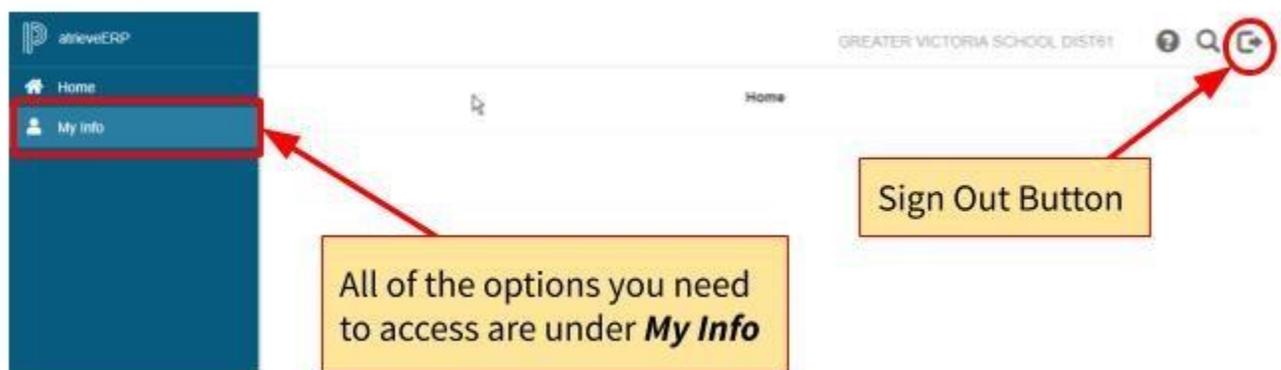
# ATRIEVE **EXPENSE CLAIM** INSTRUCTIONS – BUS DRIVERS

## How Do I Login to Atrieve?

Go to [www.prairiesouth.ca](http://www.prairiesouth.ca) and click on Staff then AtrieveERP/Powerschool. Staff still use their username and password to login; however, it is highly recommended that all staff use the desktop/laptop version of the **Google Chrome** browser (NOT *Internet Explorer, Firefox, Safari* or another Web Browser). It is possible to use Atrieve on mobile devices, however it may not be as easy to navigate and enter information on smaller screens.

## The Main Screen

The Main Screen displays the menu items to the left, instead of above. All of the options employees need to access are nested under the *My Info* Menu.

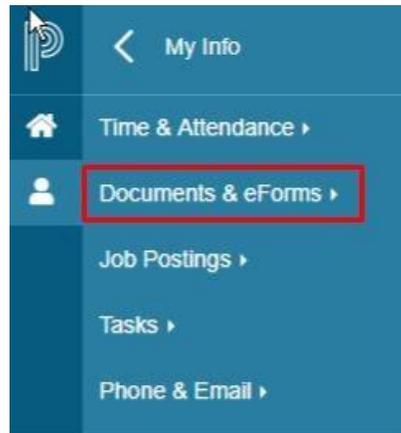


## Submitting Expense Claim Forms

Click on the *My Info* Menu on the left-hand side of the screen.



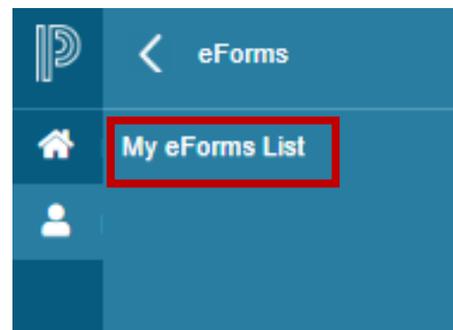
Click *Documents & eForms*.



Click *eForms*



Click *My eForms List*



Click *Expense Claim* under Submit a New Form. If you have any forms that you saved and haven't submitted, they'll show up under My Un-Submitted Forms. You will also be able to view your processed forms as well.

My Forms

Submit a New Form				My Un-Submitted Forms - Click on a form below to edit and submit it.			
	Form Description	ID	Created	Other Info			
My Forms							
Expense Reimbursement							
Expense Claim							

My Submitted Forms - Click on the links below to view details.				
Form Description	Edit Or Cancel	Track ID	Created	Other Info

My Processed Forms - Click on the links below to view details					
Form Description	Track ID	Created	Other Info	Status	
Expense Claim	Track 43749	16-May-2019 08:15:54 AM	Claim Month: May	Approved	
Expense Claim	Track 31148	00-Sep-2018 12:13:23 PM	Claim Month: August	Approved	

Fill in the top section of the form. Always keep Budget Location as Transportation Dept and Department must always be Transportation. Enter the month and a short description.

### EXPENSE CLAIM FORM

IF YOUR BANKING INFORMATION HAS CHANGED, PLEASE INFORM THE PAYROLL DEPARTMENT

Name:  Budget Location:  Month:

Description:

Department:

If you are submitting meals for charter trips, enter them in the Per Diem Expenses area of the form. Enter the date, purpose, to/from then scroll over to Meals and select the meals you are claiming. Do NOT enter KM into this form for charter trips.

Description:

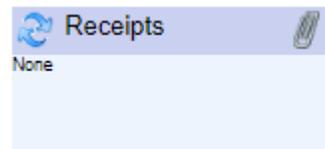
Department:

Per Diem Expenses:									
Date	Purpose	From/To Description	KMs	Roundtrip	Daily Rate	Total KMs	Total Mileage	Meals	Private Residence
<input type="text" value="11-Jun-2019"/>	<input type="text" value="Charter to Regina"/>	<input type="text" value="MU to Regina"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="Lunch Only"/>	<input type="text" value="- Select -"/>
<input type="text" value="YYYYMMDD"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>

If you are submitting receipts for medicals or for your license enter them under Other Expenses. You also need to attach your receipts (see next step).

SUBTOTALS							<input type="text" value="0.00"/>	<input type="text" value="15.00"/>	<input type="text" value="0.00"/>
Other Expenses (Please Attach Receipts):									
Date	Description	Vendor	Books				GST on Invoice	Total Invoice	
<input type="text" value="12-Aug-2019"/>	<input type="text" value="Medical"/>	<input type="text" value="Southland Medical Clinic"/>	<input type="checkbox"/>				<input type="text"/>	<input type="text" value="80.00"/>	<input type="text"/>
<input type="text" value="13-Aug-2019"/>	<input type="text" value="SGL Written Exam"/>	<input type="text" value="SGL"/>	<input type="checkbox"/>				<input type="text"/>	<input type="text" value="25.00"/>	<input type="text"/>
<input type="text" value="YYYYMMDD"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				<input type="text"/>	<input type="text"/>	<input type="text"/>

If you need to attach a receipt, click on the paperclip at the top right of the form. Make sure you have the receipt saved somewhere so you can attach it.



Once you have completed everything, click Save if you want to go back to your form another time or click Submit if you want to send it immediately.