



HOW TO GUIDE

CREATE AN OFFICE EXPENSE CLAIM

This guide will demonstrate how to create an office expense claim. An office expense claim can be either:

1. a reimbursement for expenses paid, or
2. a payment directly to a supplier.

Create a new claim

Select **Office Expenses** tile.



1. Select **Create Claim**.

Create Claim

There are three stages to create an office claim: **Claim, Expense Details** and **Supporting Documents**. These will appear at the top of the screen once you select who the claim is for.

2. From the dropdown select who you are creating the claim for. The claimant is the person the office expense is attributed to. It is not necessarily the person who is being reimbursed. For example, for office expenses, the claimant is the Parliamentarian. If you are claiming a reimbursement, select this option under payment details section.

Note: You can create a claim for yourself, on behalf of another colleague in your current office or for your parliamentarian. When creating a claim for another person, you must assign it to them so they can review it.

Add the expense details

3. Enter one or more expenses to the claim. These should be shown on the invoice.

Note: Select the information icons (i) for information and guidance about the field. Guidance on expense categories and codes refer to the *Work Expense Playbook*.

4. To add another expense, select **+ Add Expense**.
5. Complete all fields in pop window.
6. To add another expense, select **+ Add Expense**. Repeat the process until you have recorded all your expense details.
7. Select **Save**.

Add the supplier details

If the supplier has been paid select **Reimbursement**. You will be prompted to enter the payee. Otherwise, select **Payment to Supplier**.

8. Select the Supplier from the pop-up list.



Where the supplier does not exist, you will need to request the PEMS administrators to add the supplier before submitting your claim. To do this, select **Request New** and complete the form.

Note: when entering **Invoice Date** – Select the date as per the invoice. The invoice date is the date the invoice is received by the office for payment.

9. Once you have filled the remaining fields, **Save** your claim and **OK**.

Add supporting documents

You must attach supporting documents to your claim, at a minimum the tax invoice or statement.

10. Scroll to the top of the page to add **Supporting Documents**.
11. Select the **+** symbol to upload attachments and **Save** your claim.

Review and submit or assign the claim

12. Select **Review** and ensure details are entered correctly.

Review

13. Once reviewed you can Assign the claim for review or certification by selecting **Assign To** and select a staff member (for Review) or your parliamentarian (for Review and Certification).

Note: Only the claimant can submit the claim for certification to the parliamentarian. This means that you can't submit the claim to the parliamentarian for certification, if you are creating the claim on behalf of a colleague.

14. Search and select the person to assign the claim to from the pop-out list.

15. Enter a comment for the person you are assigning to and select **OK**.

The claim is now sitting with your colleague or parliamentarian for their action. They will see the claim in their Office Claim dashboard.

Note: The claimant will automatically see the claim in their Office Claim dashboard. Refer to the *Review an office Expense claim* how to guide.

For further information or support:

MaPS

Non-travel related work expenses and HR services and advice.

 maps.finance.gov.au

IPEA

Travel related advice, travel claim or reporting enquiries relating to parliamentarians and their employees.

 ipea.gov.au