

The University of Texas at Tyler
UT SHARE / PEOPLESOFT
Expense Reimbursement Procedures for
Employee / Payee Certification

Financial Services highly recommends that you choose Chrome as your browser for entry, certification and approval in UT Share/PeopleSoft.

Employee Certification through notification by email:

Employees will be notified by email that a reimbursement is in process for them which requires their review and certification of the charges.

Note: The email address that is on file with Human Resources is used to generate the email notification.

An expense report has been submitted that requires your action:

Employee ID: 5f
Employee Name: C
Submission Date: 2019-06-04
Report Description: 2019 UA Graduation
Report ID: 0000
Business Purpose: NT-Other (Specify)
Total Amount: 15.92 USD
Reimbursement Amount: 15.92 USD
Entered By: 6f
Updated By: 5c

You can navigate directly to the approval page by clicking the link below:

https://urldefense.proofpoint.com/v2/url?u=https-3A_my.utshare.utsystem.edu_psp_ZAIHPRD_EMPLOYEE_ERP_c_APPROVE-5FEXPENSE-5FTRANSACTIONS.EX-5FSHEET-5FAPPR.GBL-3FAction-3DU-26SHEET-5FID-3D0000222393&d=DwlCaQ&c=e7TYJBzRfB0YbjEn2u3vBA&r=vChqPSCslEyzgyQ9ggyQYdqITl4vI54Vok483UR9KD8&m=A6Ffq9KNy94-14rFKSXMBV-GEKcHX8XpJwjbT4KEFA&s=KcX4vihtED1SP_0rZqFKO7p4_WYFk8z1jrle6bth27M&e=

Click on the blue hyperlink to navigate to the expense report.

Enter your entire email address and university single sign-on password if you are not already logged in.

Welcome to the UT Tyler Authentication System

Login Failed. Make sure you used your entire email address (jdoe@uttyler.edu)

Email Address:

Password:

If you deleted the email notification, you can also login directly to UT Share/PeopleSoft.

Employee Certification through your “Worklist”:

After you have logged in, click on the “Worklist” hyperlink.



The screenshot shows the UT Tyler website interface. At the top, there is a blue navigation bar with the UT Tyler logo on the left and 'Home', 'Worklist', 'Add to My Links', and 'Sign out' on the right. Below this is an orange bar with 'Favorites' and 'Main Menu'. The main content area is divided into two columns. The left column is titled 'Employee Self-Service' and contains links for 'Time Reporting', 'Payroll & Compensation', 'My Career', 'Personal Information', and 'Benefits'. The right column is titled 'UTT Announcements' and contains links for 'Finance', 'Human Resources', and 'System Announcements'. A red arrow points to the 'Worklist' link in the top navigation bar.

The following screen populates.

Click on the link showing your name.

The screenshot shows the 'Worklist' page for user Patricia Speer. The page title is 'Worklist' and the subtitle is 'Worklist for 6001207034: Patricia Speer'. There is a 'Detail View' link and a 'Worklist Filters' dropdown menu. Below this is a 'Worklist Items' section with a search icon and a 'View All' link. The main content is a table with the following data:

From	Date From	Work Item	Worked By Activity	Priority	Link
Michael S Reed	11/21/2017	Approval Routing	Approval Workflow	3-Low	VoucherApproval_589218_NonPOVoucher_2014-10-01_N_0_BUSINESS_UNIT:UTTYL_VOUCHER_ID:00085276_RDCR3_0_A

There is a 'Reassign' button next to the link in the table row.

After choosing one of the two options to locate the Expense Report, you are ready to review and certify your reimbursement.

Verify that all information is correct and complete, then click on one of the two options available.

- Click the “Reviewed” button if all information is correct.
- Click the “Send Back” button for revision, if the information is incorrect.

Approve Expense Report - Expense Summary Expense Details

Patricia Speer Actions: ...Choose an Action

Business Purpose: TRV-Attend Meeting, Conf, etc. Report: 0000210673 Submitted for Approval
 Description: test 9.2 Created: 06/10/2019 Patricia Speer
 Reference: Last Updated: 06/10/2019 Patricia Speer
 Accounting Date: 06/10/2019 Accounting Template: STANDARD
 Budget Status: Valid Budget Options: Budget Checking completed. Report is ready for Approval/Posting.

Totals Urgency: ● [View Analytics](#) [Workflow History](#) [Notes](#) [Attachments](#)

Employee Expenses (1 Line)	0.10 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD		
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD		
Amount Due to Employee		0.10 USD		Amount Due to Supplier		0.00 USD	

Approval History

Submitted
Patricia Speer

Employee Certification
Patricia Speer

Department Approval
(Pooled)

Travel Approval
(Pooled)

Payment

Action	Role	Name	Date/Time
Submitted	Employee	Patricia Speer	06/10/2019 9:19:23AM

Comments

I certify that the expenses are just, true and correct and were incurred by me while on University business on dates shown on supporting documentation. I also certify that expenses claimed as reimbursable were not for personal use/gain or considered as an unallowable expense according to the disbursing UT University guidelines or respective funding agency. In the event of an overpayment, or if payment is received from another source for any portion of the expenses claimed, I assume responsibility for repaying the disbursing UT University immediately.

Expense Line Expense Details

Date	Expense Type	Description	PC Business Unit	Project	Activity	Reimburse Amt	Currency	Approve
06/07/2019	NT-Business Meeting Expense	test 9.2				0.10 USD		<input checked="" type="checkbox"/>

After clicking the “Reviewed” or “Send Back” button, you should get a pop-up box with an “OK” or “Cancel” button.

Approve Expense Report					
Submit Confirmation					
Patricia Speer			Report ID 0000210673		
Totals					
Employee Expenses (1 Line)	0.10 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee		0.10 USD	Amount Due to Supplier		0.00 USD
✓ This report will be reviewed.					
OK		Cancel			

- By clicking the “OK” button, you are completing the Employee Certification. Next the document routes to the Budget Authority.
- By clicking the “Cancel” button the Expense Report page will populate and allow further review or allow you to “Send Back” the document to the creator for corrections.

Note: By clicking on the “Reviewed” button, you are agreeing with the certification statement found in the “Comments” section which reads in full:

“I certify that the expenses are just, true and correct and were incurred by me while on University business on dates shown on supporting documentation. I also certify that expenses claimed as reimbursable were not for personal use/gain or considered as an unallowable expense according to the disbursing UT University guidelines or respective funding agency. In the event of an overpayment, or if payment is received from another source for any portion of the expenses claimed, I assume responsibility for repaying the disbursing UT University immediately.”