How to Submit an Expense Report

Please follow the instructions below to create an expense report for your out-of-pocket expenses.

1. Login to Minerva
2. Select “Student” Menu
3. Select “Expense Reports Menu”
4. Select “Submit an Expense Reports”
5. Select “Submit an Expense Report”
6. Select “Submit an Expense Report for Yourself”
7. Enter the Destination City, Start and Return dates. For non-travel expenses, please enter “Montreal” if claiming non-travel expenses incurred in Montreal. Enter the date of the first receipt as the Start date and the date of the last receipt as the End date.
8. Select the Purpose for the expense report. For conference registration, please select “Other Personal Reimbursements” and not “Participant fees” which is meant for subject fees paid to participants.
9. Under “Describe Purpose” field, enter a detailed description of the trip or nature of the expenses:
   - Full name of the conference (no acronyms)
   - Destination city
   - Start and end date of conference
   - If claim only part of the expenses of the trip, please indicate “other expenses are covered by third party” , “no lodging/transportation expenses to be claimed” or “no other expenses to be claimed”, etc.
   - Purchase details – provide sufficient details (i.e. name of the study, how is the item purchased related to the research project, etc.)
10. Enter the “Default Fund Code”
11. Enter the “Claimant Affiliation”: For claimants other than the Principal Investigator, the affiliation with the PI's research group must be specified (E.g. Graduate Student, Research Staff, Visiting Researcher).
12. Click Continue
13. Enter each receipt as individual items
    - Enter the “Receipt date”
    - In the “Expense item” field, select the appropriate category
    - In the “Description” field, enter a description for each receipt item including the vendor name and what it is for.
    - Tab to the “#of Kilometers/Miles” field and leave this field blank. It is only used when claiming mileage.

- Tab to the “Transaction amt” field and enter the total amount paid (including taxes) as it appears on the receipt.
- If you are claiming only part of a receipt, enter the full amount in “Transaction Amount”. Then deduct personal expenses in “Non-McGill Expense”, the balance to be paid will show in “Allowable Expenses”.
- Select the appropriate “Currency”
- Exchange rates for USD, GBP and Euro are automatically populated. You may override it with the exchange rate shown on your credit card statement. The hyperlink for “Currency exchange rate” may be used for searching it on the Bank of Canada website.
- Select the “Purchasing location”
- The amount displayed in “GST/HST” field is automatically calculated based on the transaction amount and purchasing location. If the amount displayed does not match your receipt, enter the tax amount as it appears on your receipt. When entering Airfare, enter 0 under GST and QST.
- Enter FOAPAL information (please obtain the fund number from your supervisor).

14. Click on “Add New Item” to enter more receipts and repeat Steps 13
15. Click on Save and View” to verify the request
16. Click on “Complete- Submit Request”
17. If there are any outstanding advances associated with the trip, select the advance(s) by clicking the appropriate box in the “EXR select” column
18. Click on “Continue”
19. Click on “Print and mail hard copy to above address”. Print the expense report into PDF file.
20. Sign electronically as claimant and have your supervisor sign as the approver. If the approver is the Chair, you can leave it blank as we will obtain the Chair’s signature for you.
21. Number the receipts to match the item number indicated on the expense report.
22. Submit the expense report along with all scanned receipts and supporting documents (e.g. summary of participant payment, detailed conference agenda, email invitation between PI and research collaborators/students if applicable, etc.) in one PDF file to sciencefinancepod3@mcgill.ca to start the review process.