EXPENSE CLAIM
walkthrough

In order to be paid for attendance at an event, such as a workshop, or reimbursed for any UNA-related expenses, you must submit an expense claim. Expense claims can be submitted right from your UNA app.

Do you need to submit an — expense claim — **?**

YES if:

The event happened on your regular day off or you are otherwise not receiving pay from your employer for the day

AND/OR

You have other related expenses, such as meal allowances, parking, or additional dependant care costs

NO if:

You have requested and had approved a Union Leave of Absence (LOA) and are being paid by your employer through salary continuation

AND

You have NO other related expenses

To submit an expense claim from the UNA app:

1 Open your UNA app, navigate to the DMS tab, and log in using your UNANet username and password.

2 Click on the drop-down menu at the top centre of your screen ("Home" should currently be displayed), and click "Expense Claims."

› Update your direct deposit information if you haven't done so already by clicking on the bank icon in the top right corner of your screen.

3 To submit a new expense claim, click the plus sign icon in the top right corner.

4 Name your event by clicking "Unnamed Event" and entering the event name or selecting the event you attended.

5 Enter your Basic Rate of Pay, which includes any long-service pay, your step in the pay scale, and your educational allowances.

6 Click on the "Funded By" section and select the source of funding (Provincial, Local, or District). Check with your Local or UNA Provincial if you are unsure.

7 Enter your shifts/hours if you are not being paid by your employer for the day (salary continuance):

› Click "add a regular shift" and enter 7.75 hours if you are missing a regular shift through an unpaid LOA or if it is a day off. Or, if you are missing an extended shift, enter the exact hours of the extended shift.

› Select LOA if you took a Leave of Absence for the day (but not if you are on salary continuance and being paid for your LOA by your employer).

› Click "add" in the top right corner when you are finished.

› If you missed abutting shifts, enter your abutting shift information by clicking on "add an abutting shift." Click "add" when finished.

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8 Enter meal allowances, if any.

› If you travelled from out of town and had to leave early or will be arriving home late, you may claim breakfast and/or dinner expenses. It is a set rate. Click "add a breakfast" or "add a dinner" and enter the date. Click "add."

9 Enter any travel expenses if you travelled more than your regular commute

› Enter the kilometers driven round-trip and the starting point and destination. Click "add."

10 Enter any accommodations costs

› If you stayed at a hotel because you travelled from out of town and could not travel in on the same day, click "add accommodations" and enter the hotel name, total amount, how much was personal (such as meal expenses or calls billed to your room or an extra day in the hotel for fun) and the first date in the hotel. Click "add." You will need to attach your receipt at the end.

11 Enter any other items

› If you incurred any other expenses, such as parking or public transit expenses or over-and-above regular dependent care costs, enter them by clicking "add another item" and enter the amount and reason. Click "add." You will need to attach your receipt at the end.

12 Once you have entered all your expenses, **double check** that they are accurate. To change an entry, click the entry, edit it, and save it. To delete an entry, click the red circled minus symbol and then click "delete."

13 To **submit your claim**, click "done" in the top right corner, then click "submit claim." You can also save your claim as a draft to finish entering later.

14 Once your claim is submitted, you can **attach your receipts** by clicking "add receipts" from the claim submitted page. You can attach a photo of your receipt(s) that you previously took, select a document, or take a photo of your receipt(s) with your phone camera. Ensure you click "ok" if the app prompts you for permission.

› If you are taking a photo, click the white middle button to snap the photo, and click "use photo" if the image is what you wanted to submit. To retake the photo, click "retake."

› To add an additional receipt, click the plus sign in the top right corner.