

For Revenue employees only: How do I input a Customs 2020 claim?

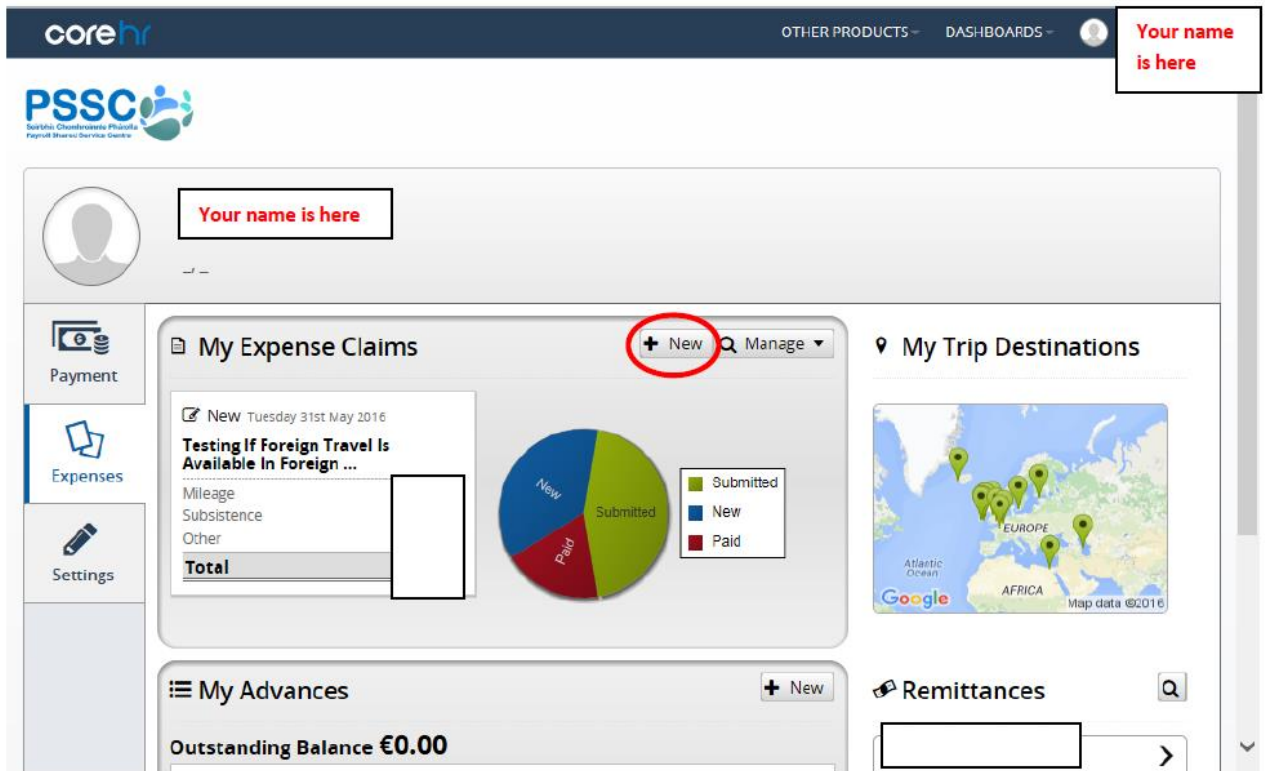
These guidelines are to advise Revenue claimants on how to claim for expenses incurred while on Customs 2020 trips which are claimable from the Customs 2020 budget.

The amount to be claimed for these specific Customs 2020 trips is agreed with the Customs coordinator (currently Victoria Fitzgerald, Customs Policy Branch, Dublin Castle, VPN 64312 or 01-6744312) before you input your claim.

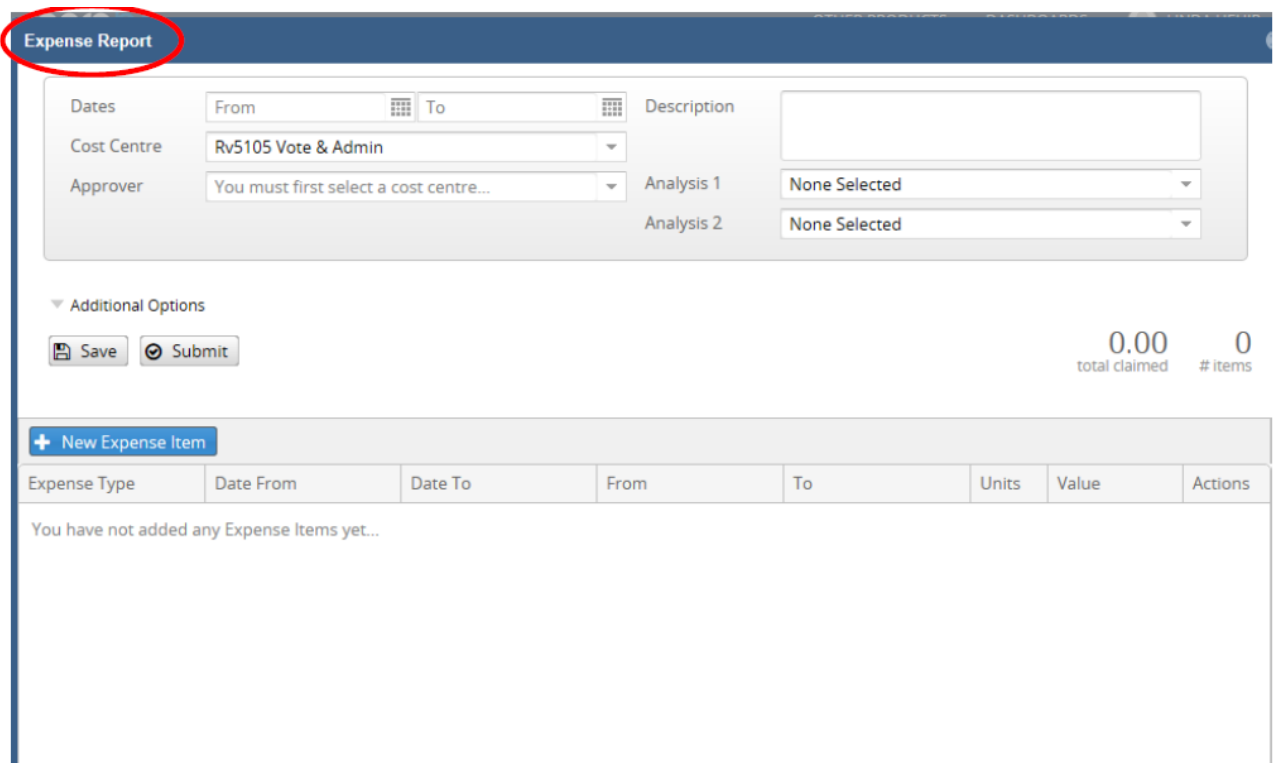
1. When you log into the PSSC system, it opens up with your salary details. On the left hand side of the screen, click on '**Expenses**'.

The screenshot shows the PSSC (Payroll Shared Service Centre) dashboard. At the top, there is a 'corehr' logo and navigation links for 'OTHER PRODUCTS' and 'DASHBOARDS'. A user profile box in the top right corner contains the text 'Your name is here'. Below the logo, there is a 'PSSC' logo with the tagline 'Náisiún Chomórannas Páilíúil Payroll Shared Service Centre'. The main content area features a 'My Payslips' section with a list of dates: 13th May 2016, 6th May 2016, 29th April 2016, and 22nd April 2016. A 'Payment Summary' table is displayed for the 13th May 2016 entry, showing 'Total Earnings', 'Total Deductions', and 'Net Pay'. A 'Full Payslip' button is next to the summary. On the left sidebar, the 'Expenses' icon is circled in red. On the right, a 'Tax Detail' section lists various tax-related fields: PPS No., PRSI Class, Tax Credit, Cut Off, Tax Basis, Marginal Tax, and USC Status. A red box on the right side of the dashboard contains the text 'Your own information is here'.

2. The following screen opens up. Click on '**+ New**'.



3. You are presented with the following Expense Report screen:



Complete all fields in your 'Expense Report' i.e.

'Dates' – click on the picture of the Calendar to select your dates

'Description' – your 'Reason for Travel'

'Cost Centre' – **Rv9999 Balance Sheet Cost Centre must be selected**
(Key in 9999 for quick selection of this Cost Centre)

‘Approver’ – Customs 2020 claims are currently approved by **Declan O’Hora**, AP, Customs Policy Branch, Dublin Castle.
In the absence of Declan O’Hora, Customs 2020 claims can be approved by **Dermot Brown** AP, Customs Policy Branch, Dublin Castle.
(Key in the approver name for quick selection of Approver)

N.B. When claimants at grade AP or higher are inputting their Customs 2020 claim, Dermot Brown will be displayed in the Approver dropdown list as **‘Dermot Brown Customs 2020 Approver’**.

‘Analysis 1’ – **‘Customs 2020 Scheme’** must be selected here

N.B. For Customs 2020 trips it is vital that the correct Analysis 1 code is selected, i.e. ‘Customs 2020 Scheme’.
‘Customs 2020 Scheme’ should only be selected under ‘Analysis 1’ for Customs 2020 trips.

‘Analysis 2’ – Correct travel type must be selected, e.g. Meetings, Training

‘Additional Options’ - If this is your first T&S Expense Claim on the PSSC system, you will also need to click on **‘Additional Options’**, and select **‘Analysis Code 3’** & **‘Default Analysis Code 4’** under the **‘Analysis 3’** and **‘Analysis 4’** drop-downs.

(These default Analysis 3 & 4 codes will automatically populate for all future claims)

Customs Excess claims:

‘Analysis 1’ – ‘Customs 2020 Scheme’ should **NOT** be selected. Claimants should select either **‘EU Travel’**, **‘Home Travel’** or **‘Non EU Travel’**, depending on the destination travelled to.

‘Cost Centre’ – Claimant’s own Home Cost Centre must be selected.

‘Approver’ – Claimant’s regular Approver must be selected.

Expense Report

Dates: 01/03/2016 to 03/03/2016

Description: Customs 2020 meeting

Cost Centre: 9999

Approver: **Rv9999 Balance Sheet Cost Centre**
Code: RV9999

Analysis 1: Select...

Analysis 2: Meetings

Additional Options

Save Submit

0.00 total claimed 0 # items

+ New Expense Item

Expense Type	Date From	Date To	From	To	Units	Value	Actions
You have not added any Expense Items yet...							

Expense Report (Item: 428835)

Dates: 01/03/2016 to 03/03/2016

Description: **Customs 2020 Meeting**

Cost Centre: Rv9999 Balance Sheet Cost Centre

Approver: **Dermot Brown Customs 2020 Approver**

Analysis 1: Customs 2020 Scheme

Analysis 2: **Customs 2020 Scheme**
Code: 109

Additional Options

Car Reg: Select... Higher Grade: Select...

Analysis 3: Analysis Code 3 Analysis 4: Select...

Save Submit

0 # items

+ New Expense Item

Expense Type	Date From	Date To	From	To	Units	Value	Actions
You have not added any Expense Items yet...							

Expense Report (Item: 428835)

Dates: 01/03/2016 to 03/03/2016 | Description: Customs 2020 Meeting

Cost Centre: Rv9999 Balance Sheet Cost Centre | Analysis 1: Customs 2020 Scheme | Analysis 2: Meetings

Approver: Dermot Brown Customs 2020 Approver

Additional Options

Car Reg: Select... | Higher Grade: None Selected

Analysis 3: Analysis Code 3 | Analysis 4: Default Analysis Code 4

Save Submit

0.00 total claimed | 0 # items

+ New Expense Item

Expense Type	Date From	Date To	From	To	Units	Value	Actions
You have not added any Expense Items yet...							

Once all fields are completed, click **'Save'** and then click on **'+ New Expense Item'**.

Expense Report (Item: 428835)

Dates: 01/03/2016 to 03/03/2016 | Description: Customs 2020 Meeting

Cost Centre: Rv9999 Balance Sheet Cost Centre | Analysis 1: Customs 2020 Scheme | Analysis 2: Meetings

Approver: Dermot Brown Customs 2020 Approver

Additional Options

Save Submit

+ New Expense Item

Expense Type	Date From	Date To	From	To	Units	Value	Actions
You have not added any Expense Items yet...							

4. You are presented with the following Expense Details screen:

The screenshot shows the 'Expense Details' form. At the top, there is a checkbox labeled 'Is this an expense item with foreign details?' which is circled in red. To its right are 'Payment By' options: 'Me' (selected) and 'Company'. Below this are fields for 'Expense Type' (a dropdown menu), 'Location' (From and To dropdowns), 'Dates' (01/03/2016 to 03/03/2016), and 'Description' (Enter Description...). At the bottom right, it shows '0.00 total claimed' and '0 # items'.

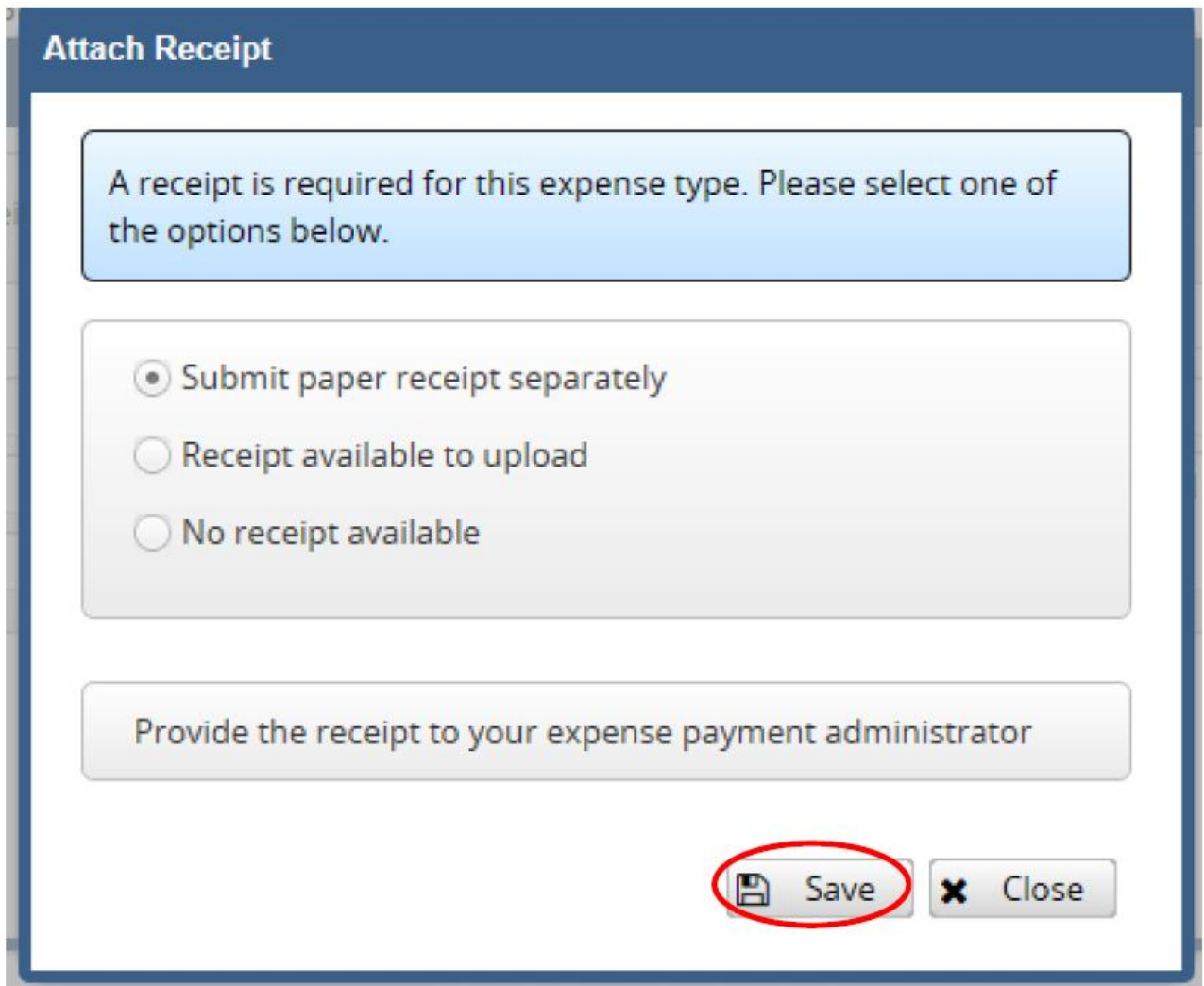
Select (tick) 'Is this an expense item with foreign details?'

N.B. As some Customs trips relate to Home Travel, this box should only be ticked if the trip relates to Foreign Travel.

In the 'Expense Type' drop down, select 'Customs 2020'.

This screenshot shows the 'Expense Details' form with the 'Expense Type' dropdown menu open. The 'Expense Type' field is circled in red, and the dropdown list is also circled in red. The selected item is 'Customs 2020' with code 301. Other items in the list include 'Customs Excess' (Code: 303), 'Ferry Travel' (Code: 41), 'Fiscalis' (Code: 300), 'Fiscalis Excess' (Code: 302), and 'Flights'. The 'Is this an expense item with foreign details?' checkbox is now checked. The 'Payment By' options are 'Me' (selected) and 'Company'. The bottom right shows '0.00 total claimed' and '0 # items'. At the bottom, there is a footer that says 'You have not added any...' and 'Displaying 1 - 8 of 18'.

5. When you select 'Customs 2020' a pop-up message will appear for 'Receipts'. You should select the relevant option and then click on '**Save**'.



The screenshot shows a pop-up dialog box titled "Attach Receipt". At the top, a light blue box contains the text: "A receipt is required for this expense type. Please select one of the options below." Below this, there are three radio button options: "Submit paper receipt separately" (which is selected), "Receipt available to upload", and "No receipt available". At the bottom of the dialog, there is a text input field with the placeholder text "Provide the receipt to your expense payment administrator". In the bottom right corner, there are two buttons: "Save" (with a floppy disk icon) and "Close" (with an 'X' icon). The "Save" button is circled in red.

6. In the '**Value**' field for 'Customs 2020', input the total amount that you are claiming for. This amount should be the figure in **Euro** which was agreed with the Customs 2020 co-ordinator prior to submitting this claim.
7. Input a detailed breakdown of your expenses in the '**Description**' field' e.g. Daily Allowance, Hotel, Public Transport, etc. Please include amounts of each expense being claimed for.

NB: THE EURO SYMBOL (€) MUST NOT BE USED.

The screenshot shows the 'Expense Details' form with the following fields and values:

- Is this an expense item with foreign details? GBP @ .778
- Payment By: Me Company
- Expense Type: Customs 2020
- Value: 450
- Location: Ireland (From), Britain London (To)
- Dates: 01/03/2016 to 03/03/2016
- Times: 07:45 to 19:45
- Description: Daily Allowance 200.00, Hotel 195.00, Public Transport 55.00, Total 450.00
- Cost Centre & Analysis Codes: 0.00 total claimed, 0 # items
- Options menu: Save, Save & Add New, Generate Subsistence, Currency, Receipts

8. Input your locations in 'Location' fields.
(Locations can be quickly selected by typing in the location and then selecting the correct location from the options provided)

For Foreign trips, 'Ireland' should be selected as your 'From' location.

9. Input your times.

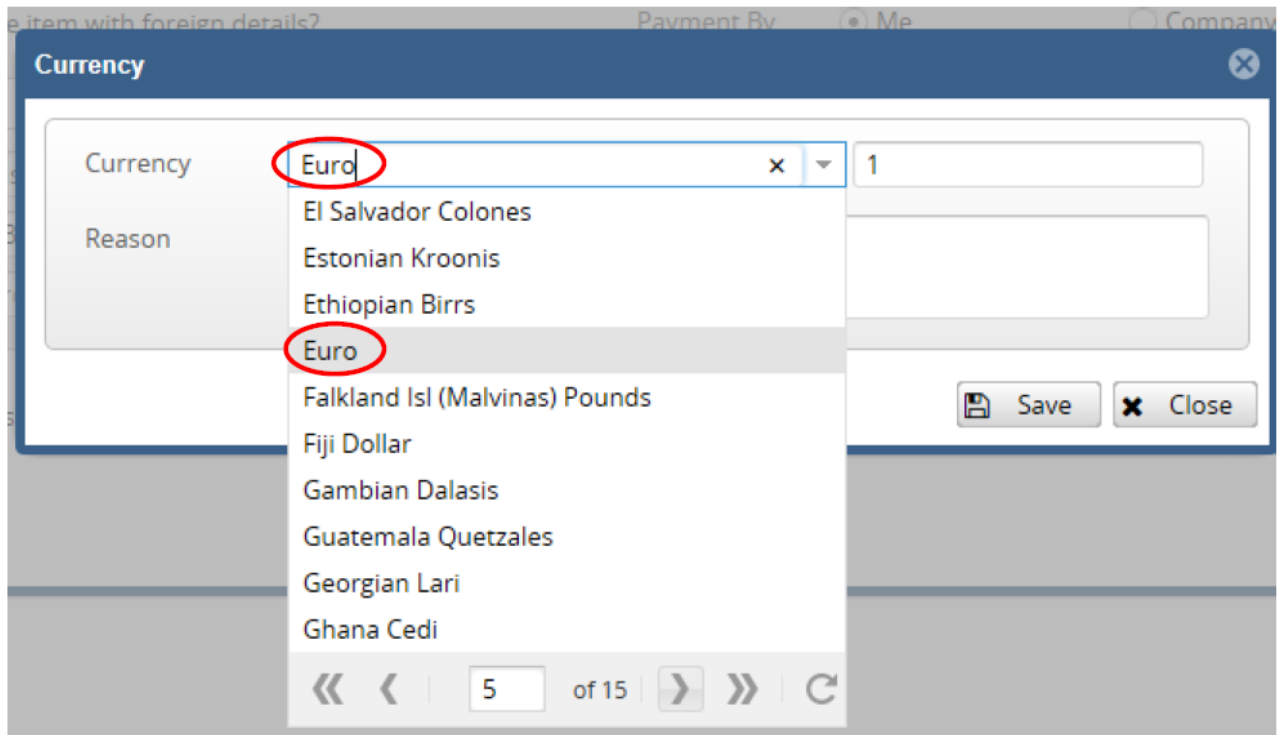
10. **NB:** If you travelled to a location which does not use the **Euro Currency**, e.g. Britain London, you will need to change the currency to **Euro**.

Select 'Options' and then 'Currency' (see below):

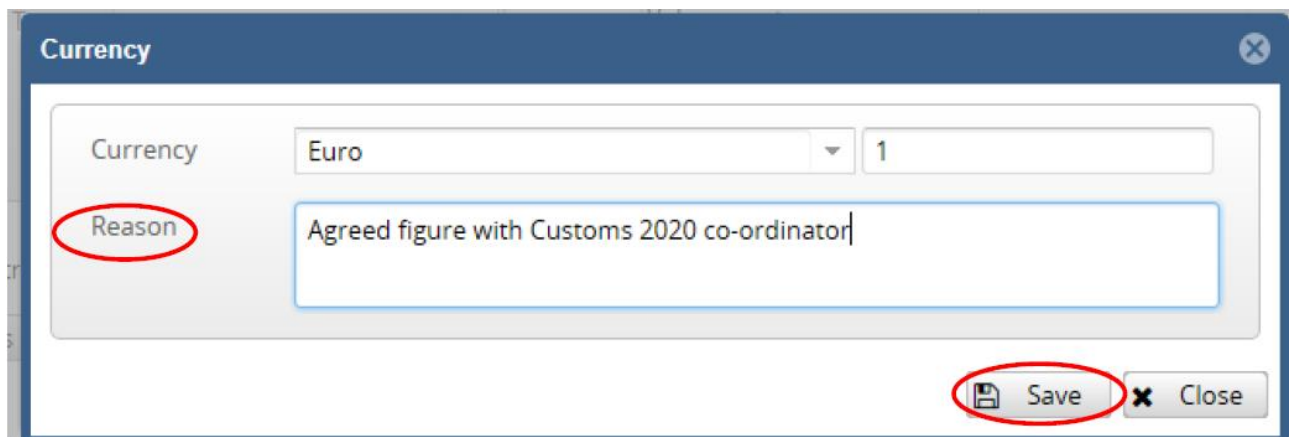
The screenshot shows the 'Expense Details' form with the following fields and values:

- Is this an expense item with foreign details? GBP @ .778
- Payment By: Me Company
- Expense Type: Customs 2020
- Value: 450
- Location: Ireland (From), Britain London (To)
- Dates: 01/03/2016 to 03/03/2016
- Times: 07:45 to 19:45
- Description: Daily Allowance 200.00, Hotel 195.00, Public Transport 55.00, Total 450.00
- Cost Centre & Analysis Codes: 0.00 total claimed, 0 # items
- Options menu: Save, Save & Add New, Generate Subsistence, Currency, Receipts

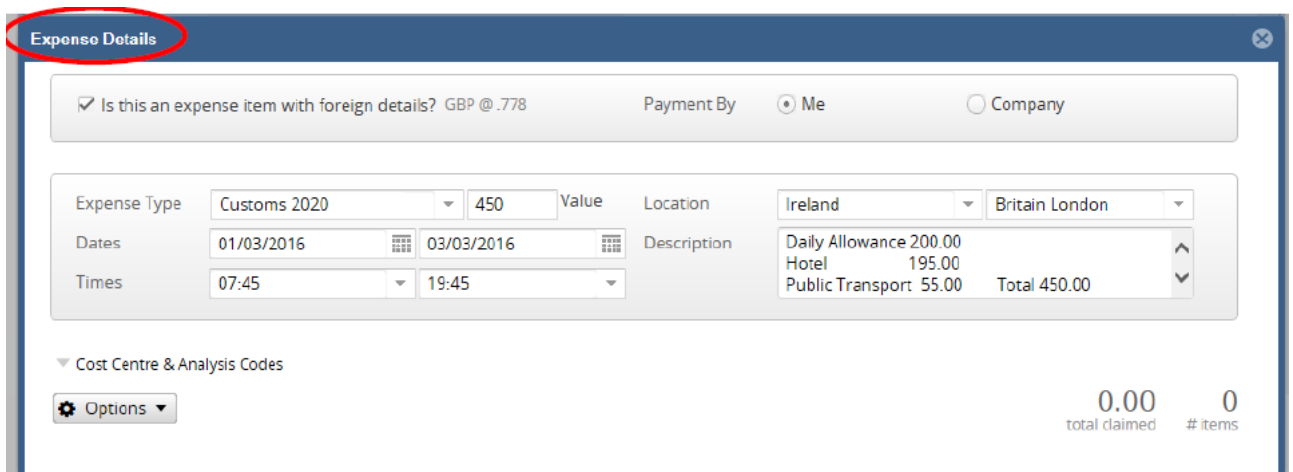
Select 'Euro'. (Key in the word 'Euro', for quick selection of this currency)



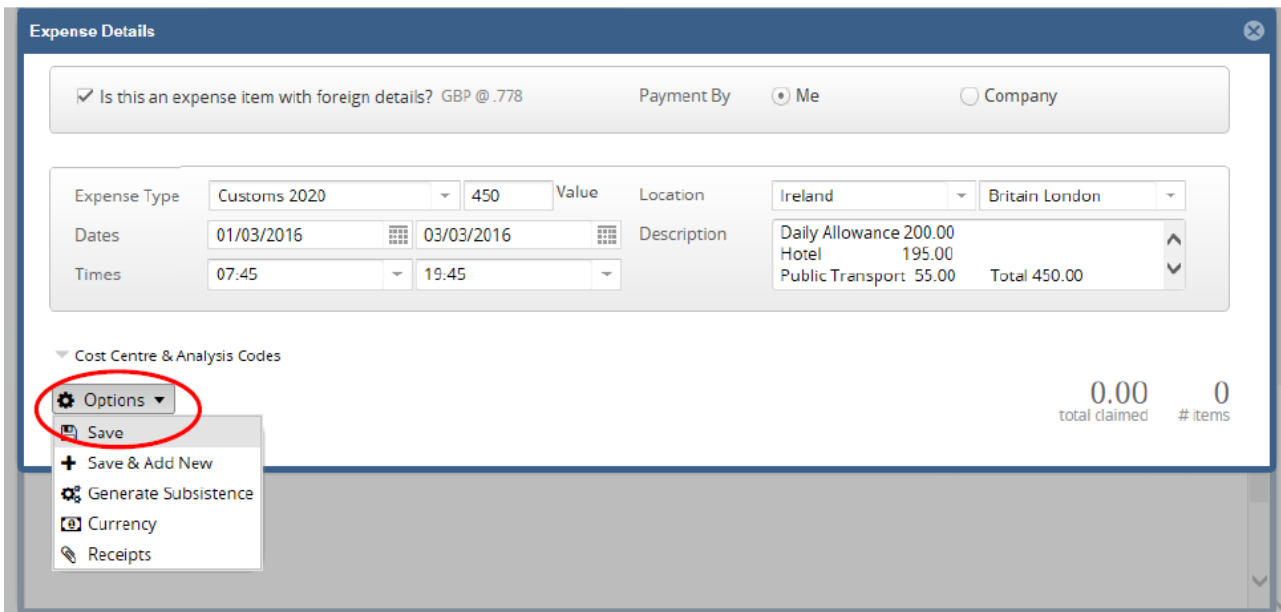
Submit a **'Reason'** & click on **'Save'**.



Once you click on **'Save'**, you are brought back to your **'Expense Details'** screen.

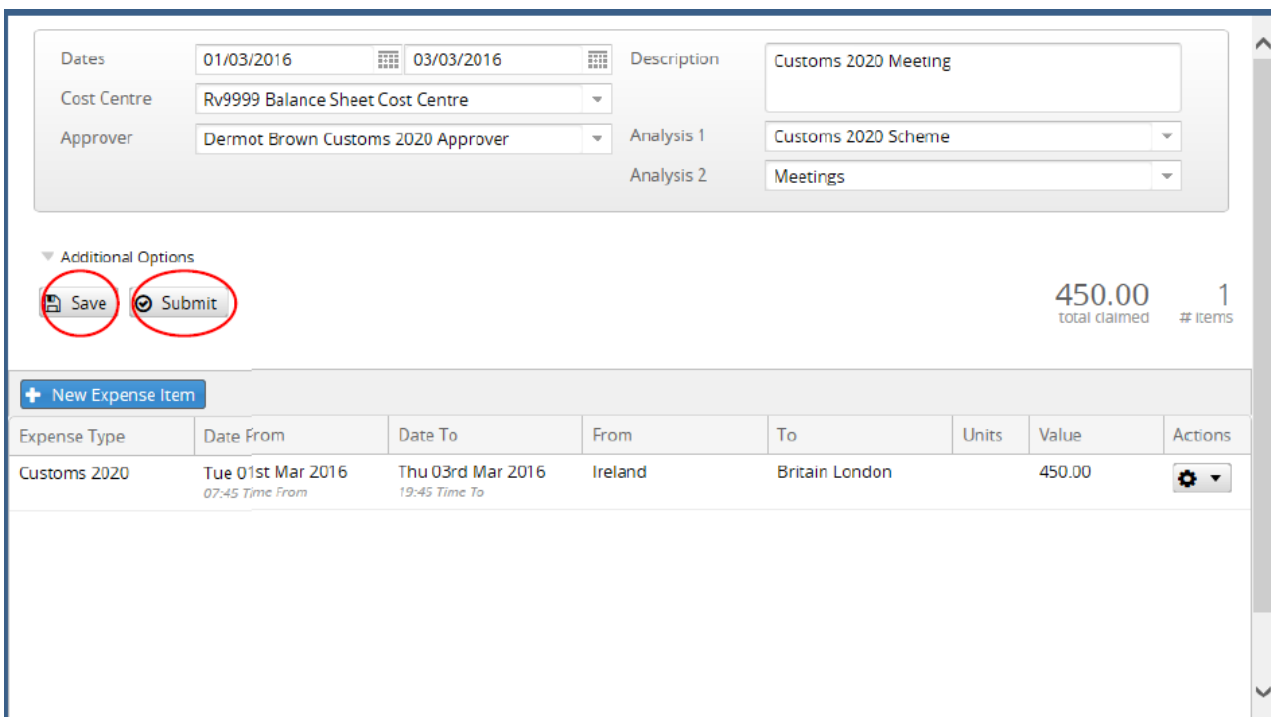


Select **'Options'** & click on **'Save'**:



The 'Expense Details' form shows a total claimed of 0.00 and 0 items. The 'Options' menu is open, with 'Options' highlighted. The form includes fields for 'Is this an expense item with foreign details?' (checked), 'Payment By' (Me), 'Expense Type' (Customs 2020), 'Value' (450), 'Location' (Ireland), 'Dates' (01/03/2016 to 03/03/2016), 'Times' (07:45 to 19:45), and 'Description' (Daily Allowance 200.00, Hotel 195.00, Public Transport 55.00, Total 450.00).

You are then brought back to the main **'Expense Report screen'** (see below):



The 'Expense Report screen' shows a total claimed of 450.00 and 1 item. The 'Save' and 'Submit' buttons are highlighted. The form includes fields for 'Dates' (01/03/2016 to 03/03/2016), 'Description' (Customs 2020 Meeting), 'Cost Centre' (Rv9999 Balance Sheet Cost Centre), 'Approver' (Dermot Brown Customs 2020 Approver), 'Analysis 1' (Customs 2020 Scheme), and 'Analysis 2' (Meetings).

Expense Type	Date From	Date To	From	To	Units	Value	Actions
Customs 2020	Tue 01st Mar 2016 <i>07:45 Time From</i>	Thu 03rd Mar 2016 <i>19:45 Time To</i>	Ireland	Britain London		450.00	

11. You can either click on:

'Save' to Save your trip for later

Or

'Submit' to Submit your trip for approval