

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 Philomena Murphy, International Policy and Brexit Branch, Dublin Castle, VPN 64343 or 01-6744343) 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 system dashboard. At the top, there is a navigation bar with 'corehr', 'OTHER PRODUCTS', and 'DASHBOARDS'. A user profile box on the right says 'Your name is here'. Below the navigation bar is the PSSC logo. The main content area features a sidebar on the left with icons for 'Payment', 'Expenses' (circled in red), and 'Settings'. The main area is titled 'My Payslips' and contains a table with columns for dates and a 'Payment Summary' section. The 'Payment Summary' section includes 'Total Earnings', 'Total Deductions', and 'Net Pay'. To the right, there is a 'Tax Detail' section with a table listing various tax-related items. A callout box on the right side of the 'Tax Detail' section says 'Your own information is here'.

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

The screenshot shows the PSSC system dashboard with the 'My Expense Claims' section highlighted. The navigation bar at the top is the same as in the previous screenshot. The main content area features a sidebar on the left with icons for 'Payment', 'Expenses', and 'Settings'. The main area is titled 'My Expense Claims' and contains a '+ New' button (circled in red) and a 'Manage' dropdown. Below the '+ New' button is a table with columns for 'New', 'Submitted', and 'Paid'. The table includes a row for 'Testing If Foreign Travel Is Available In Foreign ...' and a 'Total' row. To the right of the table is a pie chart showing the distribution of claims. Below the table is a 'My Trip Destinations' section with a map of Europe and Africa. At the bottom, there is a 'My Advances' section showing an 'Outstanding Balance €0.00' and a 'Remittances' section.

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

The screenshot shows the 'Expense Report' interface. At the top, the title 'Expense Report' is circled in red. Below it is a form with several input fields: 'Dates' with 'From' and 'To' date pickers, 'Cost Centre' set to 'Rv5105 Vote & Admin', 'Approver' with a message 'You must first select a cost centre...', 'Description', 'Analysis 1' and 'Analysis 2' both set to 'None Selected'. There are 'Save' and 'Submit' buttons. On the right, a summary shows '0.00 total claimed' and '0 # items'. Below the form is a table with columns: Expense Type, Date From, Date To, From, To, Units, Value, and Actions. The table contains the message 'You have not added any Expense Items yet...'.

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
Anne O'Callaghan AP, International Policy & Brexit Branch,
Dublin Castle.

In the absence of Anne O'Callaghan, Customs 2020 claims can be approved by **Thomas McGrath** AP, Customs Legislation Branch, Nenagh or **Declan O'Hora** AP, E-Customs & Risk Management Branch, Dublin Castle.
(Key in the approver name for quick selection of Approver)

N.B. When claimants are inputting their Customs 2020 claim, Thomas McGrath will be displayed in the Approver dropdown list as **'Thomas McGrath Customs 2020'**.

'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: 1087279)

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

Description: Customs 2020 meeting

Cost Centre: Rv9999 Balance Sheet Cost Centre

Approver: **Anne OCallaghan**

Analysis 1: None Selected
I do not wish to make a selection at this time

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

Additional Options

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...							

Eu Travel Code: 102

Fiscalis Code: 110

Home Travel Code: 101

Non Eu Travel Code: 100

Expense Report (Item: 1087279)

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

Cost Centre: Rv9999 Balance Sheet Cost Centre

Approver: Anne OCallaghan | Analysis 1: Customs 2020 Scheme | Analysis 2: Meetings

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: 1087279)

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

Cost Centre: Rv9999 Balance Sheet Cost Centre

Approver: Anne OCallaghan | Analysis 1: Customs 2020 Scheme | 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...							

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 'Times' (From and To dropdowns). A 'Description' field is also present. At the bottom right, it shows '0.00 total claimed' and '0 # items'. An 'Options' button is located at the bottom left.

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 a code of 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 'total claimed' is 0.00 and '# items' is 0. The bottom of the screen shows a pagination bar with '2 of 3' items displayed.

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

Attach Receipt



A receipt is required for this expense type. Please select one of the options below.

Submit paper receipt separately

Receipt available to upload

No receipt available

Provide the receipt to your expense payment administrator

 **Save**  Close

- 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.
- 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.


Expense Details

Is this an expense item with foreign details? GBP @ .778 Payment By Me Company

Expense Type: Customs 2020 Value: 450 Location: Ireland Description: Daily Allowance 200.00, Hotel 195.00, Public Transport 55.00, Total 450.00

Dates: 01/03/2016 to 03/03/2016 Times: 07:45 to 19:45

Cost Centre & Analysis Codes

Options:  Save

0.00 total claimed 0 # items

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.

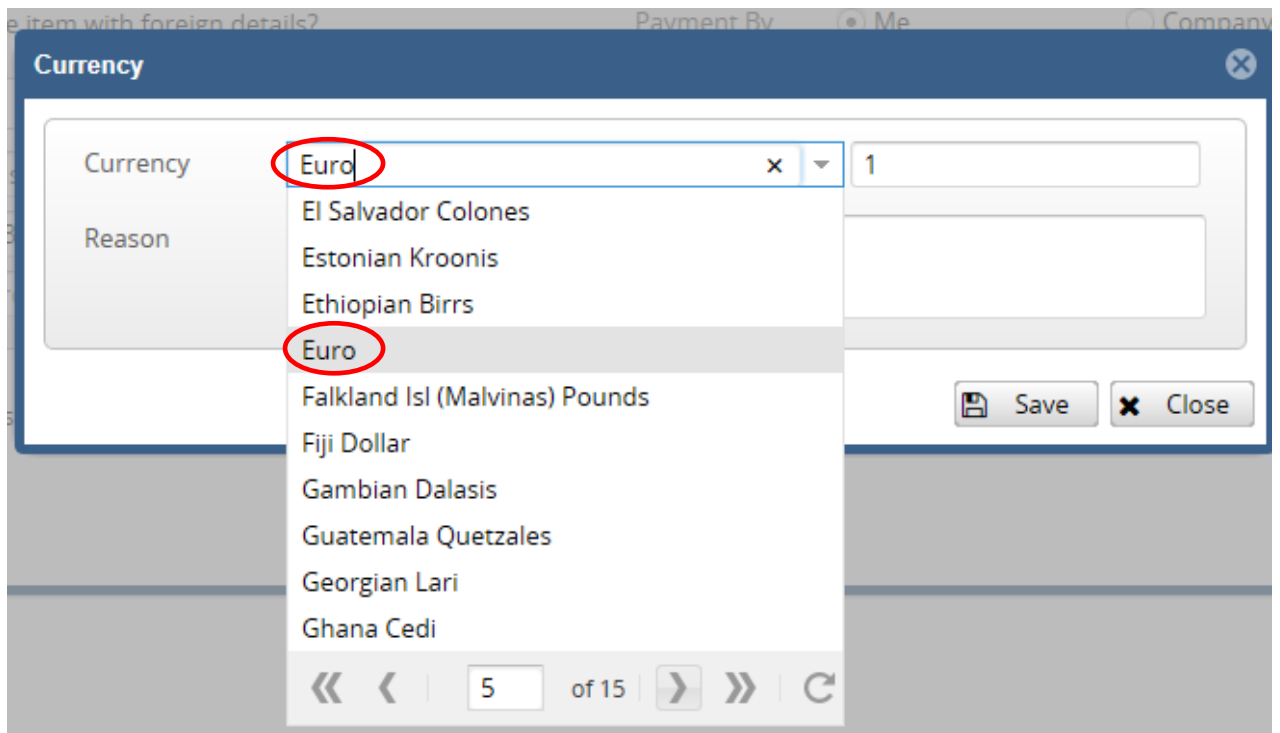
9. Input your times.

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**.

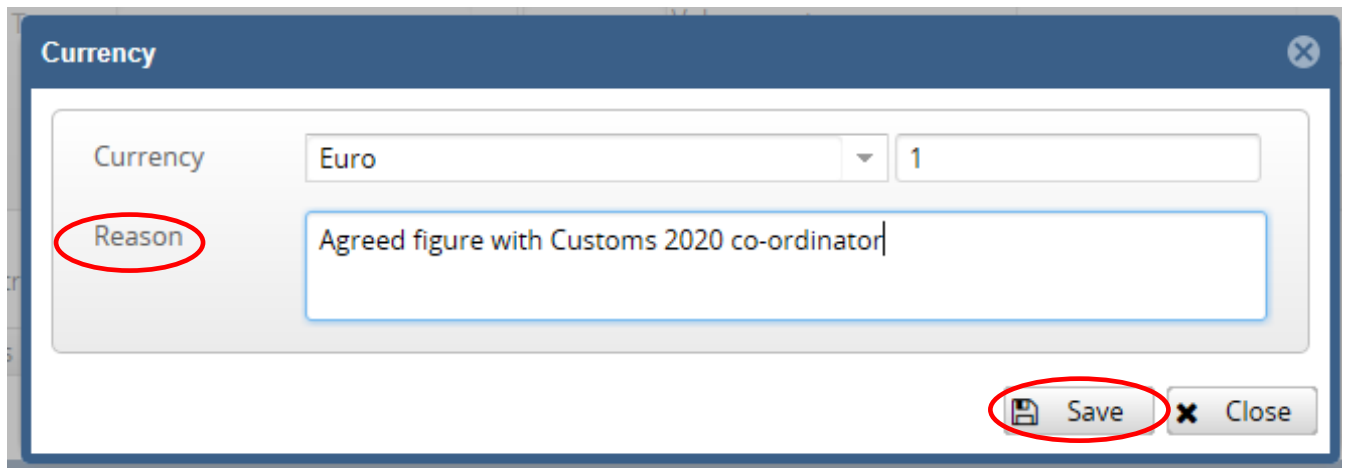
Select 'Options' and then 'Currency' (see below):

The screenshot shows the 'Expense Details' form. The 'Expense Type' is 'Customs 2020' with a value of '450'. The 'Location' is 'Ireland' and 'Britain London'. The 'Dates' are '01/03/2016' and '03/03/2016'. The 'Times' are '07:45' and '19:45'. The 'Description' includes 'Daily Allowance 200.00', 'Hotel 195.00', and 'Public Transport 55.00' with a 'Total 450.00'. The 'Options' menu is open, showing 'Currency' selected. The 'Currency' field is currently set to 'GBP @ .778'. The 'total claimed' is '0.00' and the '# items' is '0'.

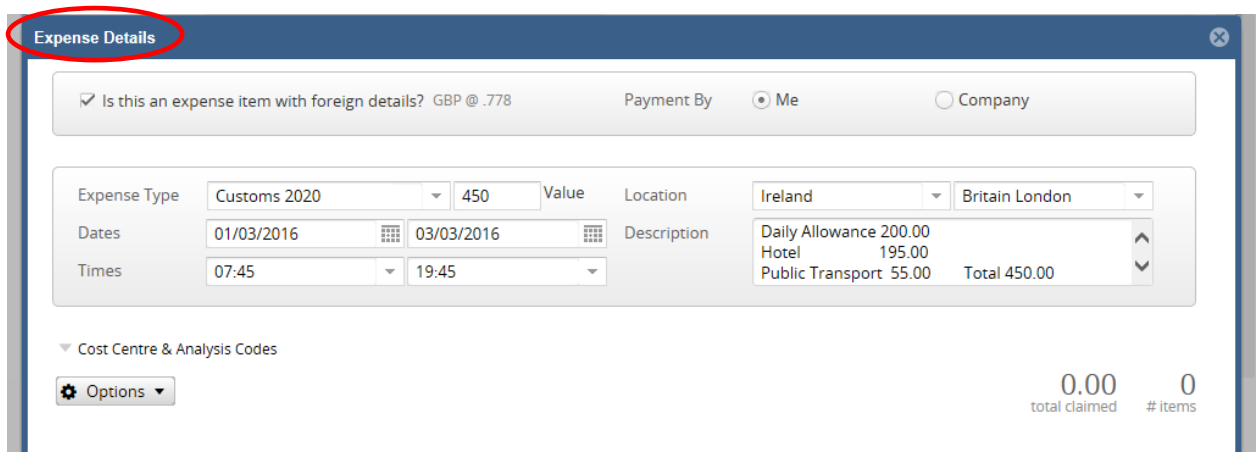
Select 'Euro'. (Key in the word 'Euro', for quick selection of this currency)



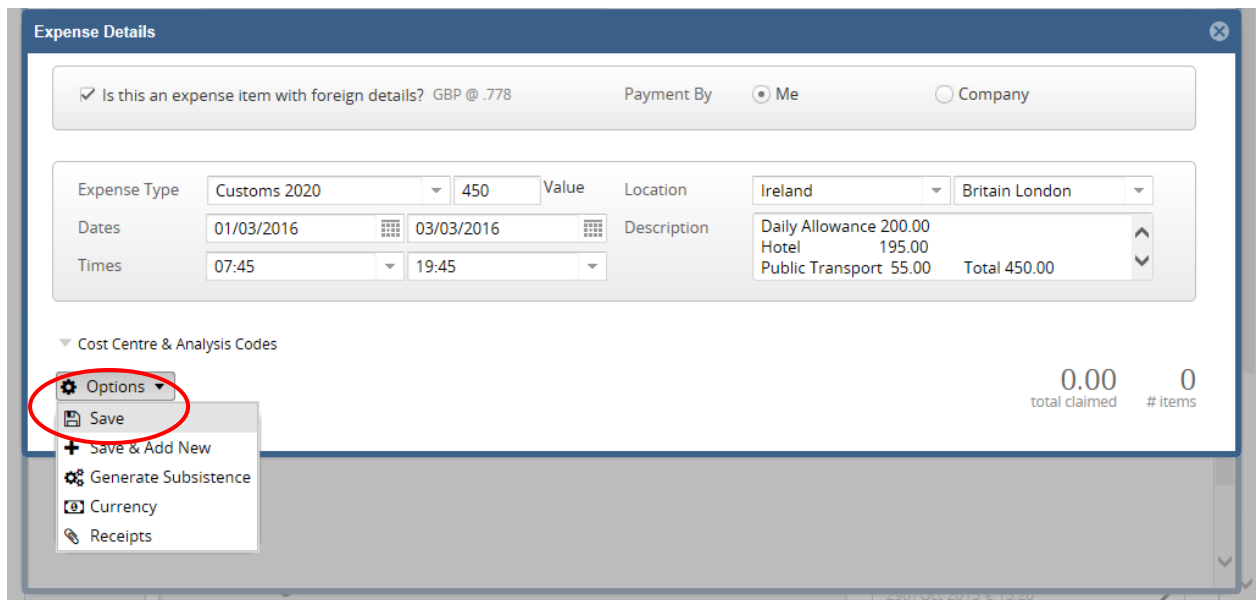
Submit a **'Reason'** & click on **'Save'**.



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

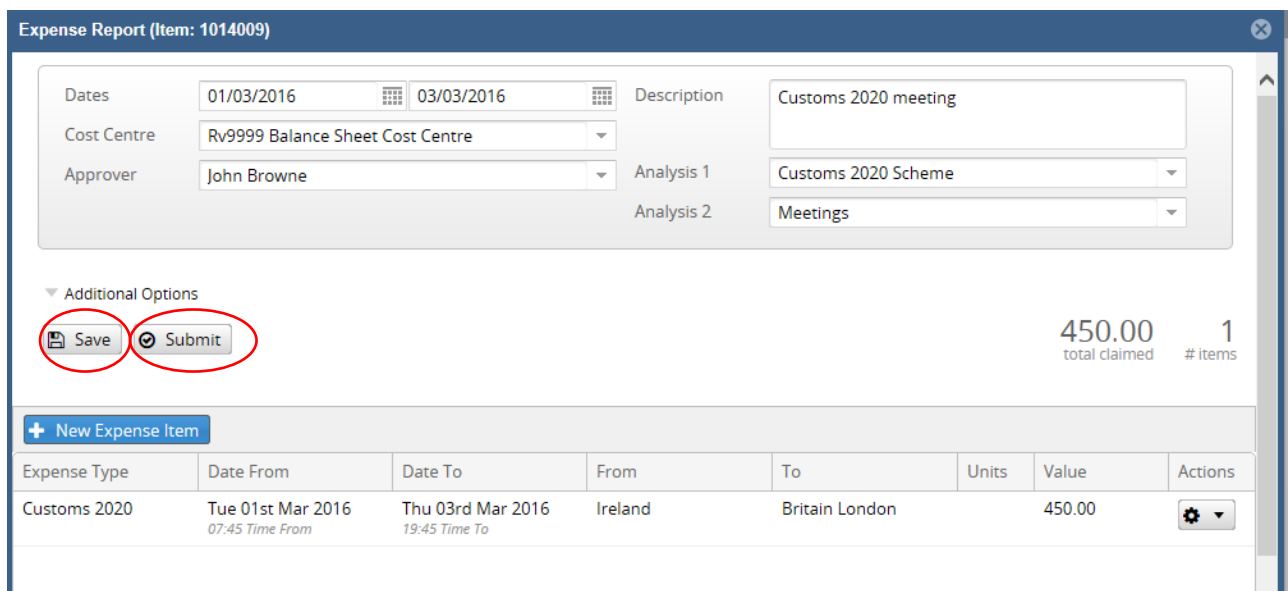


Select **'Options'** & click on **'Save'**:



The 'Expense Details' form shows a 'Customs 2020' expense for 450.00. The 'Options' menu is open, with 'Options' and 'Save' highlighted by red circles. The form includes fields for 'Is this an expense item with foreign details?', 'Payment By' (Me/Company), 'Expense Type', 'Value', 'Location', 'Dates', 'Times', and 'Description'. A summary shows 0.00 total claimed and 0 items.

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



The 'Expense Report (Item: 1014009)' form shows a 'Customs 2020 meeting' expense for 450.00. The 'Save' and 'Submit' buttons are highlighted by red circles. The form includes fields for 'Dates', 'Cost Centre', 'Approver', 'Description', 'Analysis 1', and 'Analysis 2'. A summary shows 450.00 total claimed and 1 item.

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

Updated: 25-Oct-2018