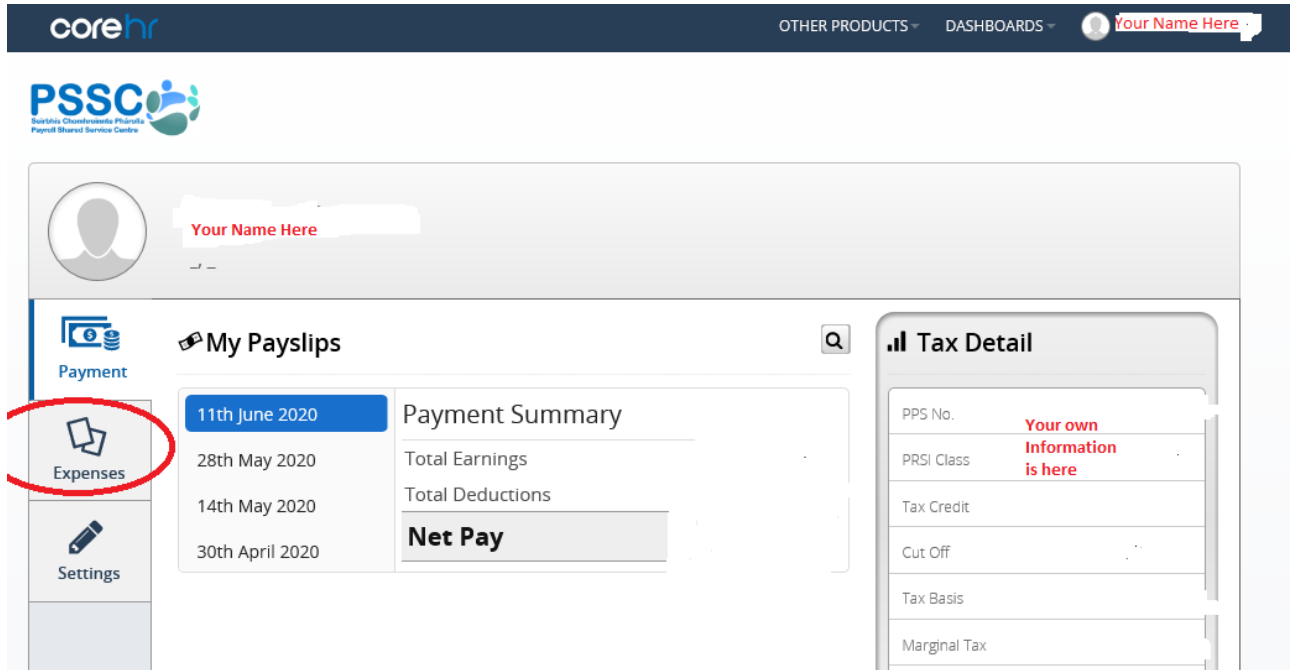


For Revenue employees only: How do I input a Fiscalis claim?

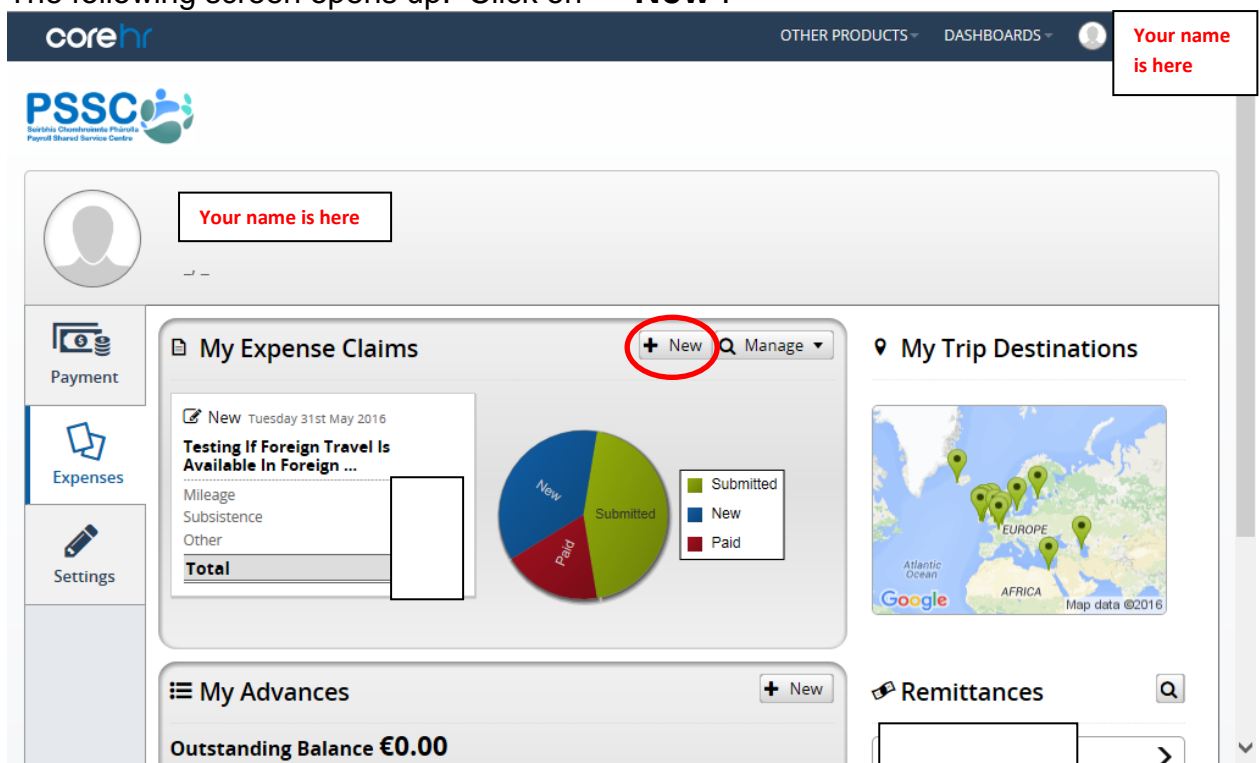
These guidelines are to advise Revenue claimants on how to claim for expenses incurred while on Fiscalis trips which are claimable from the Fiscalis budget. The amount to be claimed for these specific Fiscalis trips is agreed with the Fiscalis coordinator (currently Siobhan Casey, Dundalk Office, VPN 53459 / 042-9353459), 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 corehr PSSC dashboard. The top navigation bar includes 'corehr', 'OTHER PRODUCTS', 'DASHBOARDS', and a user profile icon labeled 'Your Name Here'. The PSSC logo is visible below the navigation bar. The main content area features a user profile section with 'Your Name Here' and a sidebar menu with 'Payment', 'Expenses' (highlighted with a red circle), and 'Settings'. The 'My Payslips' section displays a list of dates (11th June 2020, 28th May 2020, 14th May 2020, 30th April 2020) and a 'Payment Summary' table with columns for 'Total Earnings', 'Total Deductions', and 'Net Pay'. A 'Tax Detail' section on the right lists various tax-related fields like 'PPS No.', 'PRSI Class', 'Tax Credit', etc., with a red note stating 'Your own Information is here'.

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



The screenshot shows the corehr PSSC dashboard with the 'Expenses' menu item selected. The top navigation bar includes 'corehr', 'OTHER PRODUCTS', 'DASHBOARDS', and a user profile icon labeled 'Your name is here'. The PSSC logo is visible below the navigation bar. The main content area features a user profile section with 'Your name is here' and a sidebar menu with 'Payment', 'Expenses', and 'Settings'. The 'My Expense Claims' section is highlighted, showing a '+ New' button (circled in red) and a 'Manage' dropdown. Below this, there is a list of expense claims with columns for 'Mileage', 'Subsistence', 'Other', and 'Total'. A pie chart shows the status of claims: Submitted (green), New (blue), and Paid (red). The 'My Trip Destinations' section displays a map of Europe and Africa with location pins. The 'My Advances' section shows an 'Outstanding Balance €0.00' and a '+ New' button. The 'Remittances' section is partially visible at the bottom.

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, there are several input fields: 'Dates' with 'From' and 'To' date pickers, 'Description' with a text box, 'Cost Centre' with a dropdown menu showing 'Rv5105 Vote & Admin', 'Approver' with a dropdown menu showing 'You must first select a cost centre...', 'Analysis 1' with a dropdown menu showing 'None Selected', and 'Analysis 2' with a dropdown menu showing 'None Selected'. Below these fields, there is a section for 'Additional Options' with 'Save' and 'Submit' buttons. To the right, there is a summary showing '0.00 total claimed' and '0 # items'. At the bottom, there is a table header for 'New Expense Item' with columns: Expense Type, Date From, Date To, From, To, Units, Value, and Actions. The table body is empty and contains the text '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' – Fiscalis claims are currently approved by Aine Ryan AP, Dundalk Office. In the absence of Aine Ryan, Fiscalis claims can be approved by **Seamus Milne** PO, Dundalk Office.
(Key in the approver name for quick selection of Approver).

'Analysis 1' – Fiscalis must be selected here

N.B. For Fiscalis trips it is vital that the correct Analysis 1 code is selected, i.e. 'Fiscalis'.

'Fiscalis' should only be selected under 'Analysis 1' for Fiscalis 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)

Expense Report (Item: 1537032)

Dates: 28/05/2020 - 28/05/2020
Description: Fiscalis Meeting
Cost Centre: rv9999
Approver: **Rv9999 Balance Sheet Cost Centre**
Code: RV9999
Analysis 1: Select...
Analysis 2: Meetings

Additional Options

Save Submit

0.00 0
total claimed # 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: 1537032)

Dates: 28/05/2020 - 28/05/2020
Description: Fiscalis Meeting
Cost Centre: Rv9999 Balance Sheet Cost Centre
Approver: Aine Ryan
Analysis 1: |
Analysis 2: |

Additional Options

Save Submit

- None Selected
I do not wish to make a selection at this time
- Customs 2020 Scheme
Code: 109
- Eu Travel
Code: 102
- Fiscalis
Code: 110
- Home Travel
Code: 101
- Non Eu Travel
Code: 100

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: 1537032)

Dates: 28/05/2020 - 28/05/2020
Description: Fiscalis Meeting
Cost Centre: Rv9999 Balance Sheet Cost Centre
Approver: Aine Ryan
Analysis 1: Fiscalis
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 0
total claimed # items

+ New Expense Item

Expense Type	Date From	Date To	From	To	Units	Value	Actions
--------------	-----------	---------	------	----	-------	-------	---------

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

Expense Report (Item: 1537032)

Dates: 28/05/2020 - 28/05/2020 | Description: Fiscalis Meeting

Cost Centre: Rv9999 Balance Sheet Cost Centre

Approver: Aine Ryan | Analysis 1: Fiscalis | Analysis 2: Meetings

Additional Options:

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

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

0.00 total claimed | 0 # items

Save **Submit**

+ New Expense Item

Expense Type	Date From	Date To	From	To	Units	Value	Actions
--------------	-----------	---------	------	----	-------	-------	---------

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

Expense Details

Is this an expense item with foreign details? | Payment By: Me Company

Expense Type: Select... | Location: From - To

Dates: 28/05/2020 - 28/05/2020 | Description: Enter Description...

Times: From - To

Cost Centre & Analysis Codes

Options

0.00 total claimed | 0 # items

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

N.B. As some Fiscalis 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 **'Fiscalis'**.

Expense Details

Is this an expense item with foreign details? Payment By Me Company

Expense Type: Select... (circled in red)

- Cancelled Item (Code: 307)
- Customs 2020 (Code: 301)
- Customs Excess (Code: 303)
- Ferry Travel (Code: 41)
- Fiscalis (Code: 300)** (circled in red)
- Fiscalis Excess

Location: From [] To []

Description: Enter Description...

0.00 total claimed 0 # items

Options []

2 of 3

- When you select 'Fiscalis' 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

- In the '**Value**' field for '**Fiscalis**', input the total amount that you are claiming for. This amount should be the figure in '**Euro**' which was agreed with the Fiscalis 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 claimed for.

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

The screenshot shows the 'Expense Details' form. At the top, there is a checkbox 'Is this an expense item with foreign details?' with 'GBP @ .8977' next to it. Below this, the 'Payment By' section has 'Me' selected. The main form fields are: 'Expense Type' set to 'Fiscalis', 'Value' set to '450', 'Location' set to 'Ireland' and 'Britain London', 'Dates' from '28/05/2020' to '31/05/2020', and 'Times' from '07:45' to '19:45'. The 'Description' field contains a list: 'Daily Allowance 200.00', 'Hotel 195', and 'Public Transport 55.00 TOTAL 450'. At the bottom left, the 'Options' menu is open, with 'Currency' highlighted. At the bottom right, it shows '0.00 total claimed' and '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):

This screenshot is similar to the previous one, but the 'Options' menu is open and 'Currency' is selected. The 'Expense Type' is 'Fiscalis', 'Value' is '450', 'Location' is 'Ireland' and 'Britain London', 'Dates' are '28/05/2020' to '31/05/2020', and 'Times' are '07:45' to '19:45'. The 'Description' field contains 'Daily Allowance 200', 'Hotel 195', and 'Public Transport 55 TOTAL 450'. The 'Options' menu at the bottom left has 'Currency' highlighted. At the bottom right, it shows '0.00 total claimed' and '0 # items'.

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

The screenshot shows a 'Currency' dialog box with a dropdown menu open. The 'Currency' field is set to 'Euro', which is circled in red. The dropdown menu lists various currencies, with 'Euro' also circled in red. The 'Reason' field is empty. The 'Save' button is visible at the bottom right.

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

The screenshot shows the 'Currency' dialog box with the 'Reason' field filled with the text 'Agreed figure with Fiscalis co-ordinator'. The 'Reason' label is circled in red. The 'Save' button is also circled in red.

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

The screenshot shows the 'Expense Details' form. The title 'Expense Details' is circled in red. The form includes a checkbox for 'Is this an expense item with foreign details?' (checked), 'Payment By' (Me selected), 'Expense Type' (Fiscalis), 'Value' (450), 'Location' (Ireland), and 'Britain London'. Dates are 28/05/2020 to 31/05/2020, and times are 07:45 to 19:45. The description is 'Daily Allowance 200 Hotel 195 Public Transport 55 TOTAL 450'. At the bottom right, it shows '0.00 total claimed' and '0 # items'. An 'Options' button is visible at the bottom left.

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

The screenshot shows the 'Expense Details' form with the 'Options' dropdown menu open. The 'Options' button is circled in red, and the 'Save' option is also circled in red. The form fields are the same as in the previous screenshot, but the 'Location' is now 'IRL' and the description is 'Daily Allowance 200 Hotel 195 Public Transport 55 TOTAL 450'. The bottom right shows '0.00 total claimed' and '# items'.

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

The screenshot shows the 'Expense Report (Item: 1537032)' screen. The 'Save' and 'Submit' buttons are circled in red. The form includes 'Dates' (28/05/2020 to 31/05/2020), 'Description' (Fiscalis Meeting), 'Cost Centre' (Rv9999 Balance Sheet Cost Centre), 'Approver' (Aine Ryan), 'Analysis 1' (Fiscalis), and 'Analysis 2' (Meetings). At the bottom right, it shows '450.00 total claimed' and '1 # items'. Below the form is a table with columns for 'Expense Type', 'Date From', 'Date To', 'From', 'To', 'Units', 'Value', and 'Actions'.

Expense Type	Date From	Date To	From	To	Units	Value	Actions
Fiscalis	Thu 28th May 2020 07:45 Time From	Sun 31st May 2020 19:45 Time To	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

IMPORTANT NOTE on Fiscalis Excess claims:

'Analysis 1' – 'Fiscalis' 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.

Updated: 08-Jun-2020