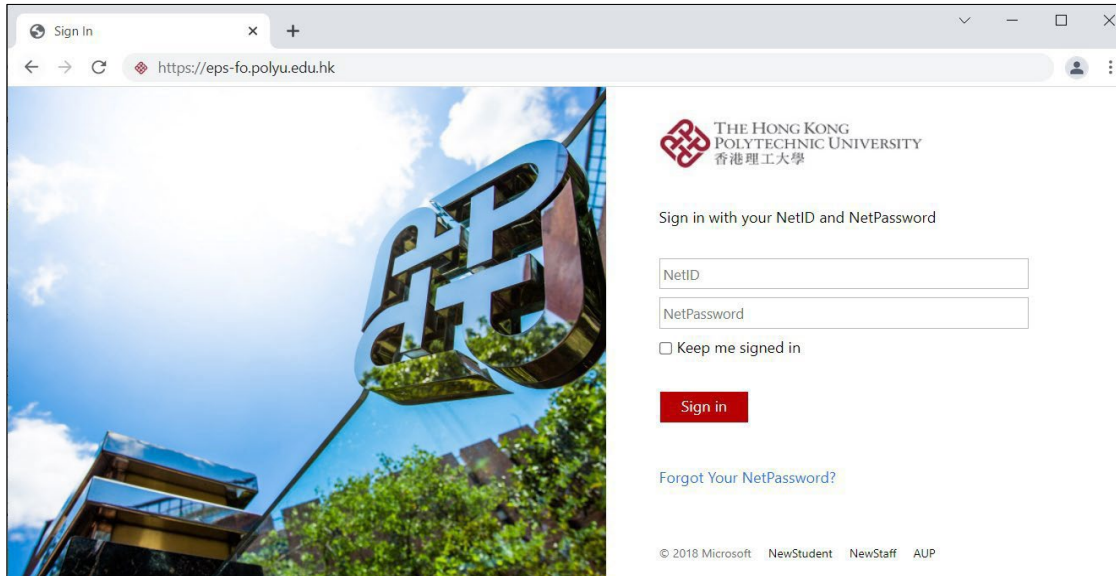


## 1. Sign in

- 1.1 Open a web browser and type <https://eps-fo.polyu.edu.hk> in the address bar.
- 1.2 Enter your PolyU NetID and NetPassword, and then click **Sign in**.

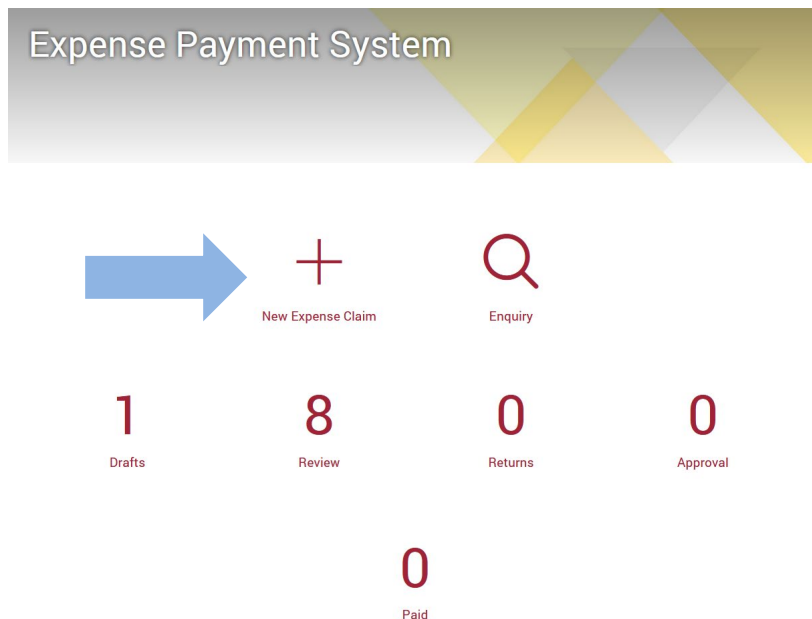


Note:

- **Internet Explorer is not supported.**
- For best user experience, we recommend the use of Microsoft Edge, Google Chrome or Mozilla Firefox.

## 2. Create a new Expense Claim


- 2.1 Click **New Expense Claim**



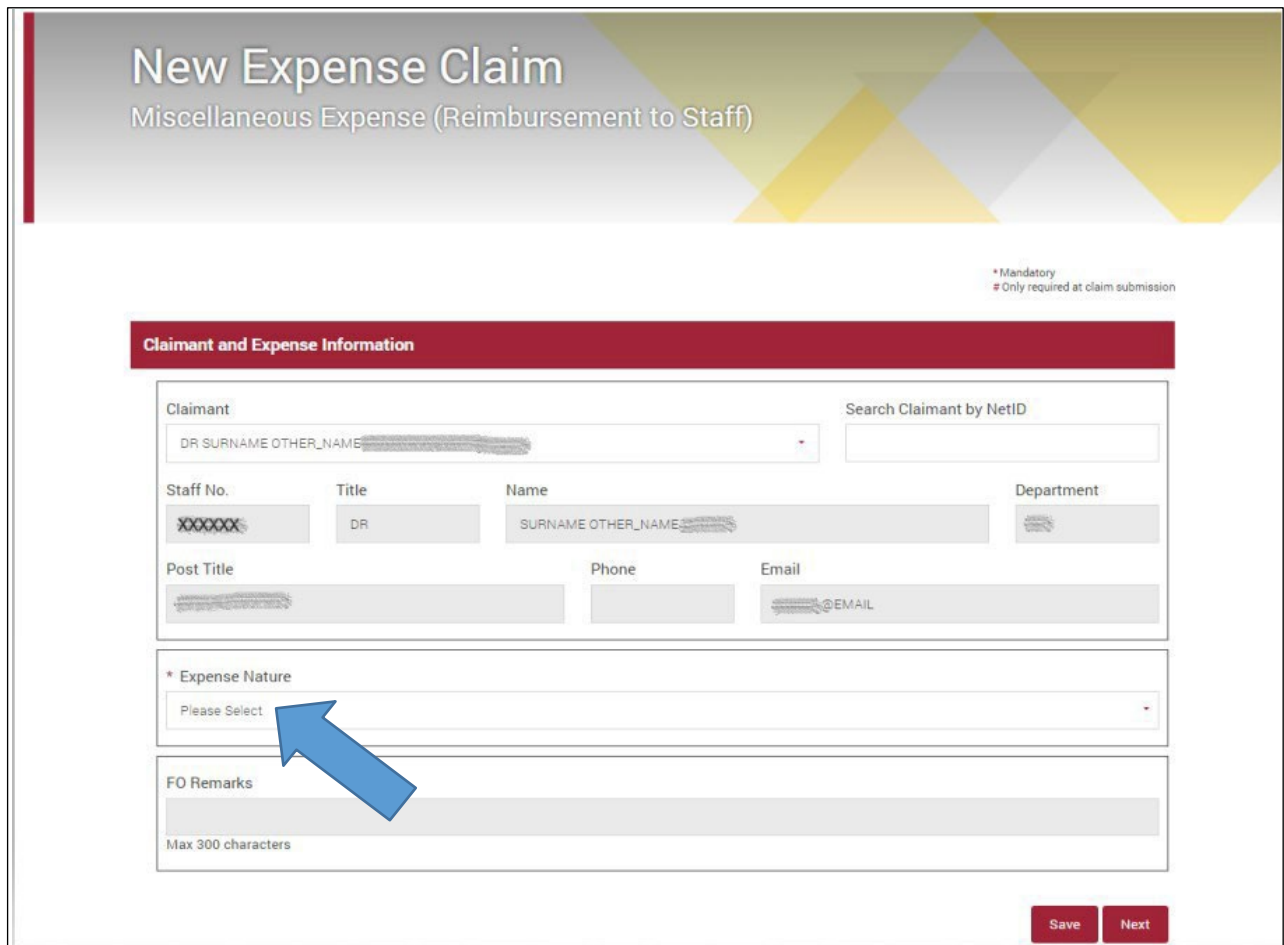
2.2 **Claimant and Expense Information**

Your name will appear in the Claimant field by default. Other staff profile, such as Staff No., Department, Post Title and email address will also be shown.

2.3 Select the appropriate **Expense Nature** for your out-of-pocket expense:

-  i. **Direct Purchase / Direct Payment**
- ii. One-day Duty Function (no prior application required)
- iii. Departmental Retreat
- iv. Official Meal / Working Meal
- v. Team-building Social Function
- vi. Individual Processional Membership Fee

2.4 Click **Next** to continue.



**New Expense Claim**  
Miscellaneous Expense (Reimbursement to Staff)

\* Mandatory  
# Only required at claim submission

**Claimant and Expense Information**

Claimant: DR SURNAME OTHER\_NAME [redacted] Search Claimant by NetID: [redacted]

Staff No.: XXXXXX Title: DR Name: SURNAME OTHER\_NAME [redacted] Department: [redacted]

Post Title: [redacted] Phone: [redacted] Email: [redacted]@EMAIL

\* Expense Nature: Please Select

FO Remarks: [redacted]  
Max 300 characters

Save Next

## 2.5 Expense Items and Receipts

Enter the following information under :

- i. **Receipt Date** - “the date of meeting”
- ii. **Currency** - “HKD”
- iii. **Claim Amount** - “100”
- iv. **Account Code** - \*\*\*not necessary to fill in\*\*\*
- v. **Receipt Type** - Select “no supporting available (Pls provide reason under Remarks)”
- vi. **Remarks** - type “Fieldwork Supervisors’ Meeting”
- vii. **Item Description** - type “Meeting Attendance Allowance” in the text box.

## 2.6 Click **Next** to continue.

**Expense Items and Receipts**

* Receipt Date ⓘ	* Currency	* Claim Amount ⓘ	Rate	HKD Equivalent
<input type="text"/>	HKD	<input type="text"/>	.0000	<input type="text"/>
# Account Code (F.RC.RN.WPXX)	Account Description	* Amount (HKD)		
X.XX.XX.XXXX <a href="#">Help</a>	<input type="text"/>	<input type="text"/>	+ -	
* Receipt Type	Please Select			
Attachment	<input type="text"/>			
Remarks	<input type="text"/>			
Max 300 characters	<input type="button" value="Remove Item"/>			
<input type="button" value="+ Add Item"/>				
* Item Description	Please Select			
	<input type="text"/>			
Max 300 characters	<input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Next"/>			

## 2.7 Reviewer & Approver

- i. Please click “Add Reviewer”
- ii. Select the reviewer (**Ms CHAN HAK CHUNG, EXECUTIVE ASSISTANT**) to review your claim from the drop-down list.
- iii. And click **Add**.

The screenshot shows the 'Reviewer & Approver' form. At the top left, there is a red button labeled 'Add Reviewer' with a blue arrow pointing to it. Below this, there are two dropdown menus for selecting approvers. The first is labeled '\* Approver 1' and the second is labeled 'Approver 2'. Both dropdowns currently show 'Please Select'. At the bottom left is a 'Back' button, and at the bottom right are 'Save' and 'Next' buttons.

This screenshot shows the dropdown menu for the first approver. The dropdown is open, displaying a list of names. The first name, 'PROF SURNAME OTHER\_NAME', is highlighted with a red box. A blue arrow points to this name. To the right of the dropdown, there is a red 'Add' button with a blue arrow pointing to it. The dropdown menu also shows other names like 'DR SURNAME OTHER\_NAME' and 'MS SURNAME OTHER\_NAME'.

- iv. Please **don't fill in the "Approver"**.
- v. And then click **Save**.

Reviewer & Approver

MS▼

Add

Reviewer

-

MS

Review

Endorse

\* Approver 1

Please Select

X

▼

Approver 2

Please Select▼

Add Comment

Back

Save

Next



**3. You will receive an email from Finance Office**

	Email subject	Meaning	Action
1)	<b>Pending for your review</b>	after you submit the claim form via EPS	no
2)	<b>Reviewer Reviewed</b>	after Phoebe Chan review your application	no
3)	<b>Reviewer Endorsed</b>	after Stella Wong endorse your application	Pls login to the EPS to process your application

**3.1 Login to the EPS to process your application if you receive the email from FO (Email subject: **Reviewer Endorsed**)**

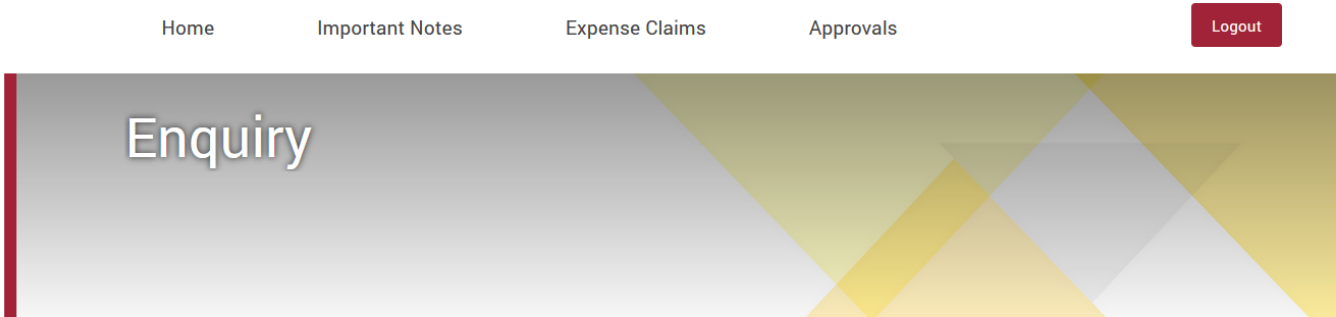
Dear Colleague

Please be informed that DR WONG SAU KUEN STELLA, CLINICAL ASSOCIATE endorsed TMxxxxxxx.

Please login to the [Expense Payment System](#) for your action at your earliest convenience. If claimant does not want to proceed the application/claim, please cancel it via the System.

Finance Office  
(This is an auto-generated email. Please do not reply.)

- 3.2 Find and click your submitted record in “Expense Claim Enquiry (Status: Saved)”
- 3.3 And then click **Submit**.



**Search Criteria**

Claim No.	<input type="text"/>	Type	Please Select	Account Code	<input type="text"/>
Nature	Please Select				
Claimant	<input type="text"/>	Department	Please Select		
Item Description	<input type="text"/>	Amount From	<input type="text"/>	Amount To	<input type="text"/>
Prepared by Delegated Inputter	Please Select				

**Expense Claim Enquiry (Status: Saved)**

**Claim No.: TM24002530 (Ready to Submit)**  
Type: Miscellaneous Expense  
Nature: Direct Purchase / Direct Payment  
Claimant: MS   
Post: INSTRUCTOR  
Submission Date:  
Amount: \$100.00





**Claimant and Expense Information**

**Expense Items and Receipts**

**Reviewer & Approver**

**Confirmation**

Claim No.: TM24002530

Name:   
Staff No.:   
Department: APSS  
Post Title: INSTRUCTOR  
Type: Miscellaneous Expense  
Nature: Direct Purchase / Direct Payment  
Total Claim Amount (HKD): 100.00  
FO Remarks:

Receipt Date: 08/01/2024  
HKD Equivalent: 100.00  
Receipt Type: No supporting available (Pls provide reason under Remarks)  
Filename:

Account Code                      Amount (HKD)  
1.54.57.0000 ⓘ                      100.00

Item Description:                      Meeting Attendance Allowance

Selected Reviewer:  
Selected Reviewer:  
Reviewed By:  
Endorsed By:  
Approver 1:  
Approver 2:



Ready to Submit

[Back](#)

[Cancel Claim](#) [Print](#) [Submit](#)



- End -