How to claim expense reimbursement and report travel expenses related to your studies

Contents

Check if you already have access to Neo

If you have submitted expense reports in NEO travel and expense management system before, you might already have an active profile. Try logging in to **neo.aalto.fi.** If you are able to log in, please ignore the below instructions for creating a profile and continue to updating your profile data if needed and making your expense report.

Create a profile in Neo (Payment Profile)

Open the profile creation form via this link (you need your Aalto ID and password):

https://sharepoint.aalto.fi/sites/Workflow/Students/Lists/Payment%20Profile/NewForm.aspx

Step 1 Accept the terms and fill in the requested information. All details are mandatory due to Finnish taxation and bookkeeping rules.

- accept the terms and conditions
- country of residence
- bank information: country and bank account number (in IBAN format)

Click ”Save”. The system checks your details and you will receive an email with a link to Step 2 form.

Step 2 Follow the link in the email notification you received. Fill in additional information:

- all first names as written in your passport
- name of Aalto school
- address

Click “Save and submit”. It takes overnight for the system to create a NEO profile for you.

Your profile will be active until the next July 31st.

Log in to Neo

Log in to NEO via the aalto.fi pages Tools or by typing **neo.aalto.fi** in your browser.

Please note that you can access Neo from anywhere but if you are not in Aalto network (Aalto workstations, VPN or VDI) multifactor authentication (MFA) is used. More information on multifactor authentication can be found here: https://www.aalto.fi/en/services/how-to-use-mfa

Instructions on how to use VDI:

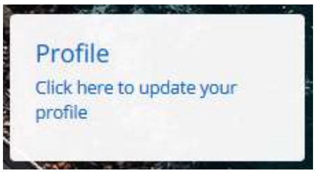
https://www.aalto.fi/en/services/vdiaaltofi-how-to-use-aalto-virtual-desktop-infrastructure

Instructions on how to setup VPN connection to Aalto:

https://www.aalto.fi/en/services/remote-connection-to-aaltos-network-vpn

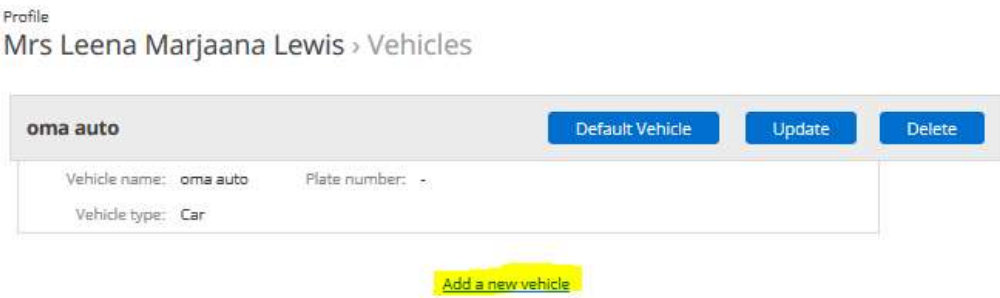
Update your profile in Neo

Select **Profile** box on Neo landing page



In **General** section, check that your name is correct and update it if needed. Add your email and mobile number in the business information fields:

In **Vehicle** section, add a car if you need to claim partial mileage in your expense report:



Create your expense report in Neo

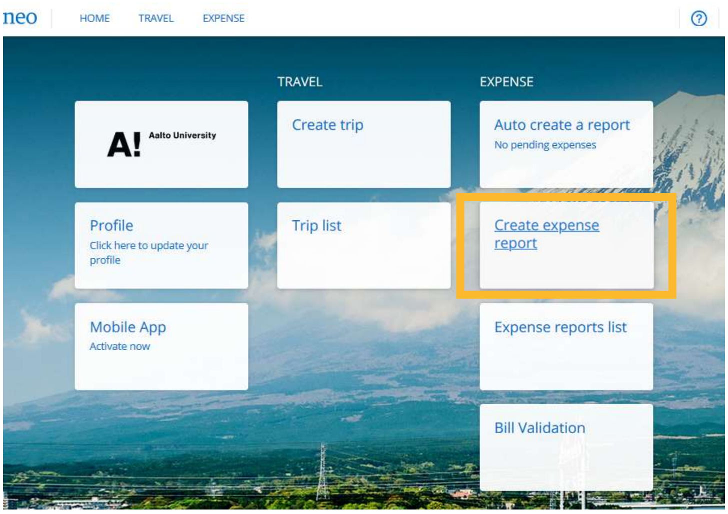
Before you start making your expense report, make sure you have the following at hand:

- **Project number** and **cost center**
- Students of ARTS: Documented **approval** from the course responsible; either an approval form used at your department or an email including:
  - Name of the student
  - Name of the teacher in charge
  - Project number and cost center
  - Course code and course name
  - Description and purpose of purchase
  - Approved total sum
- **Receipts** from your purchases

Please note the following when making your expense report:

- Only report those expenses you have paid and that your teacher/course responsible person has approved.
- Attachments have to be in **PDF or picture format (.jpg, .png**, ..).
- The maximum size of an attachment is **3MB**
- Do not attach documents with sensitive information to your expense report (e.g. bank account details).
- The processing of the expense report takes approximately 2-3 weeks.
- If some information is missing, the expense report will be returned to you and the payment will be delayed.

Step 1 Select "Create expense report"



Step 2 Fill in the expense report header form

Name
Non-travel: Goods/Services mmyy
Travel: Reason Destination mmyy

Reason for expense
Describe the purchased materials or services in detail

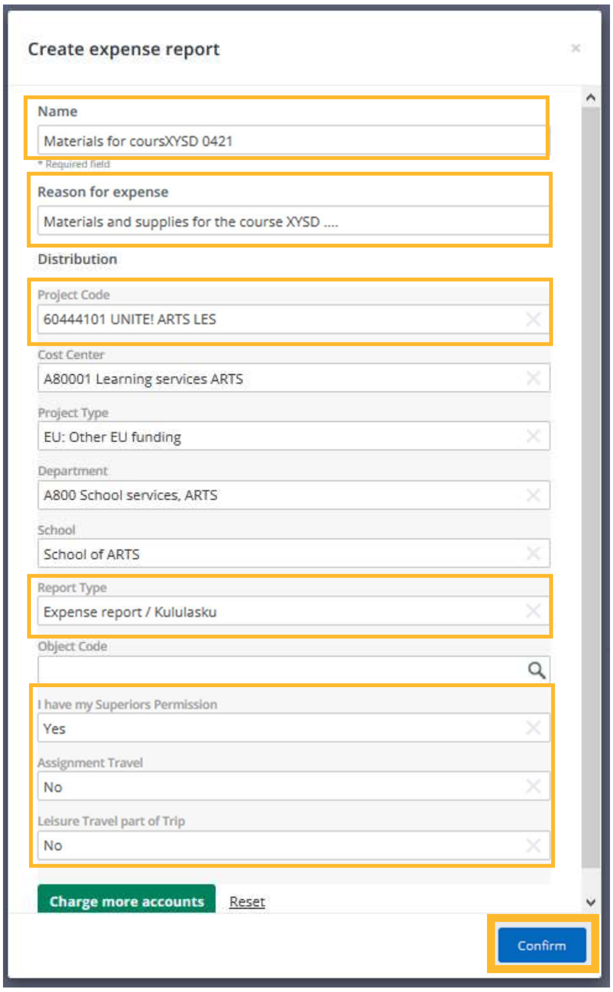
Project code
Type in the project number or search with the project name. The project related fields below the project code are automatically populated. Double click the project code; the fields related to project code will be automatically populated (cost center, project type, department, school).

Report Type
Select Expense report for materials and Travel Expense report for travel related expenses

I have my Superiors Permission
Select "Yes", you always need your course responsible person's prior approval for purchases

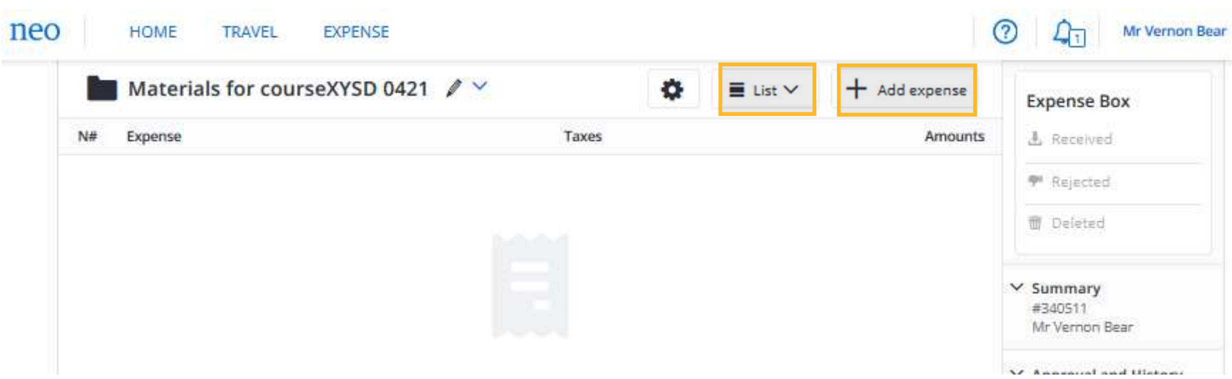
Assignment Travel and Leisure Travel Part of Trip
No

Click **Confirm** after you have filled in the information

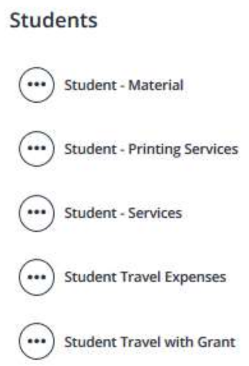


Step 3 Add your expense lines

Click **+ Add expense** to add your expense lines to your report. You can change the view to a **List** view instead of week or month view if you wish.



Select the correct expense type:

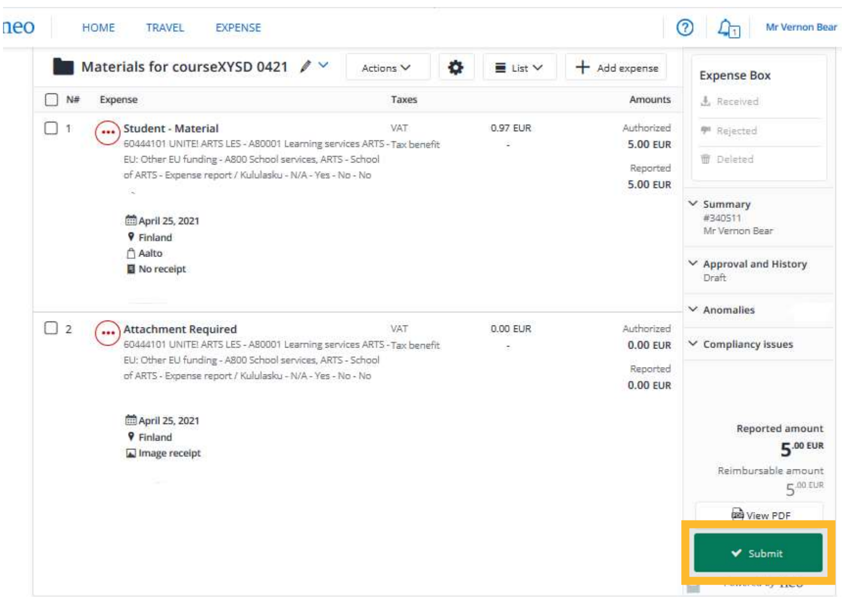


- **Student material** for supplies and materials
- **Student printing services** for printing expenses
- **Student services** for services not related to travel
- **Student travel expenses** if you are claiming travel expenses incurred from representing Aalto at a fair or similar event
- **Student travel with grant** for reporting travel expenses that are covered by Aalto travel grant. Use this expense type for travel tickets, accommodation and other expenses related to your trip and approved prior to your trip.
- **ARTS students:** Use expense type “Attachment” to attach the approval form or email

If you had a flight booked via Neo, you will have a flight purchase pending in your Received box. Add the flight expense to your expense report by clicking the Received box and adding the expense. Attach the GBT flight receipt to the expense line.

Fill in mandatory information and attach receipt (one attachment max 3MB per expense line allowed). Close the expense line by clicking **Confirm**. If any mandatory information is missing, the anomalies box will tell you what needs to be added to the report.

Step 4 Submit your expense report

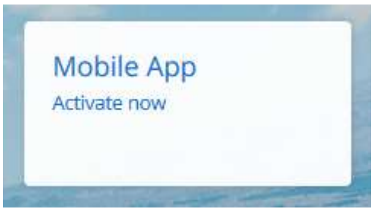


Do not change the bank account details in the last Submit window.

Neo Mobile application (iPhone and Android)

You can **use NEO mobile** after you have accessed NEO with a computer for the first time:

1. Download NEO mobile app from App Store or Google Play Store
2. On your computer, open a QR-code in NEO by clicking the box “Mobile App – Activate now”
3. In your mobile device, activate NEO app with the QR-code you have opened on your computer



In the Neo mobile app you can:

- make your expense report
- create expense lines
- take photos of your receipts and attach them to your expense line
- submit your expense report