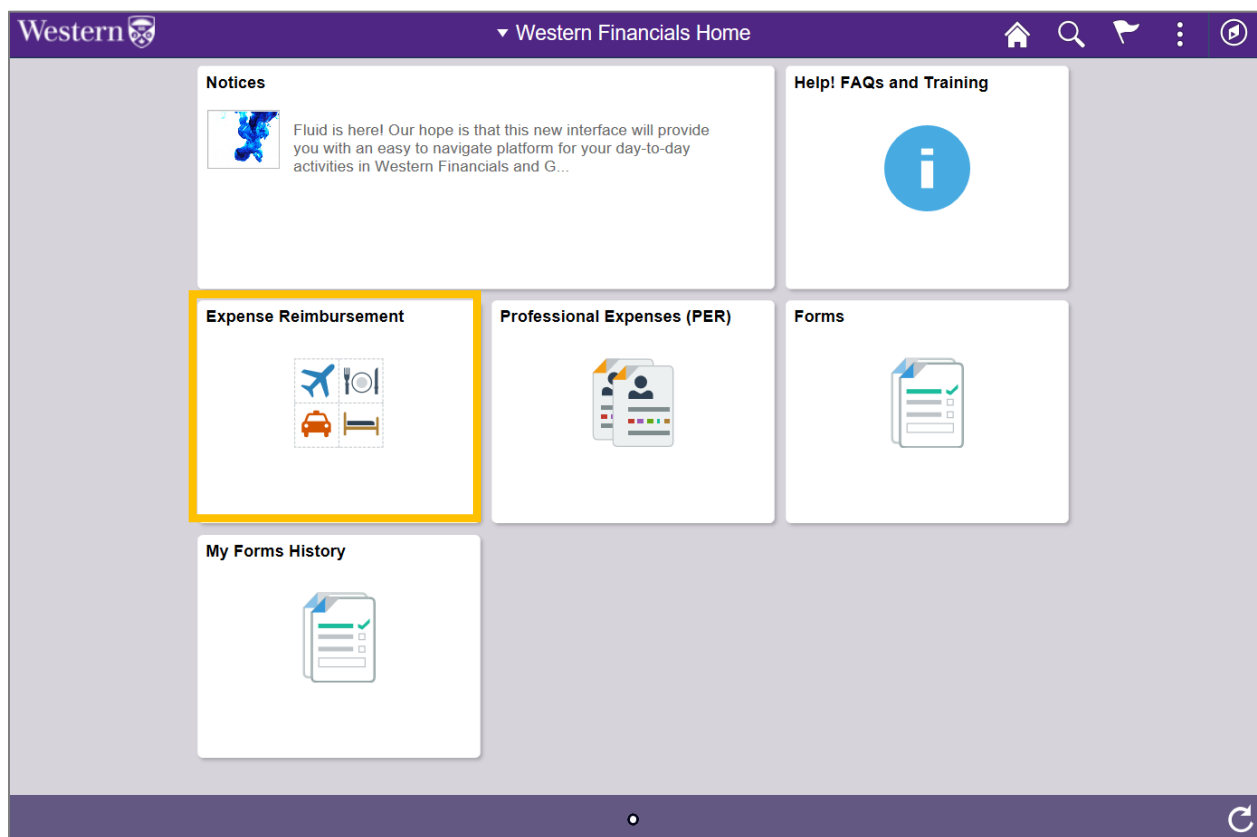


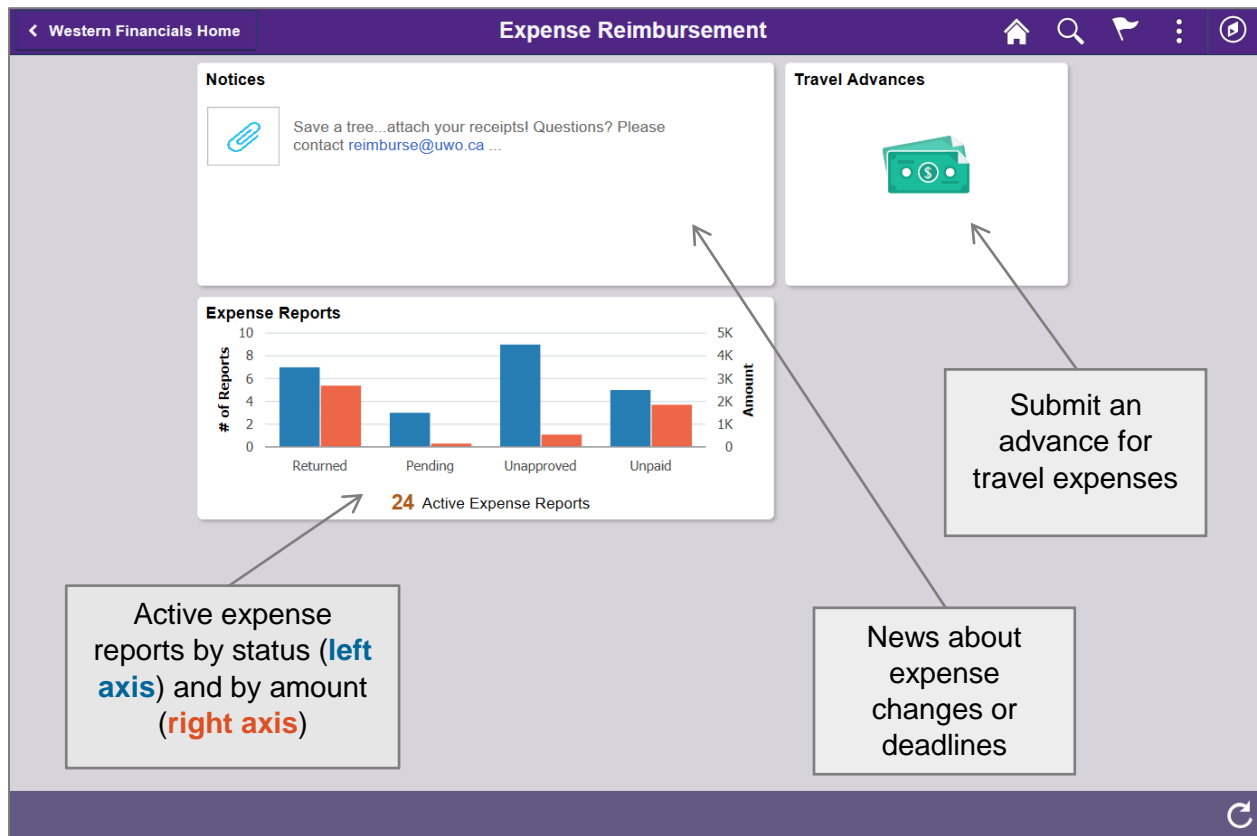
Expense Reimbursement Module

The following FAQs relate to the **Western Financials Expense Reimbursement module**. The images assume that the user is viewing the module on a desktop computer; however, this module uses a fluid user interface and will therefore adapt to the device you are using - give it a try on your tablet or phone!

The Expense Reimbursement dashboard is located on the Western Financials Home homepage:

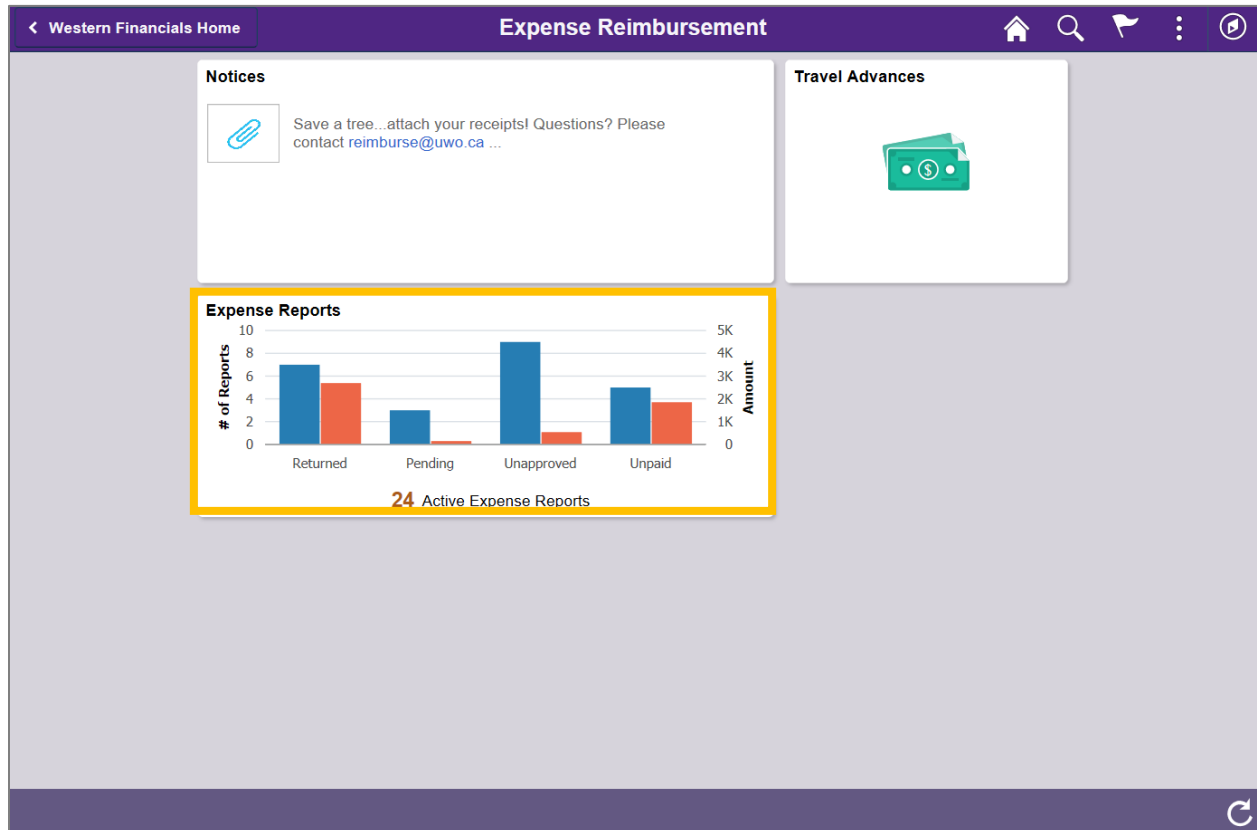


What will I see on the Expense Reimbursement Dashboard?



How do I submit an expense report?

Click on the **Expense Reports** tile in the Expense Reimbursement dashboard:



Click on the **Create Expense Report** button:

The screenshot shows the 'Expense Reports' page for Lillianne Ross. The 'Not Submitted' status is selected in the left sidebar. The main content area shows 'Not Submitted' with a message: 'There are currently no Expense Reports with this status.' Below this message, the 'Create Expense Report' button is highlighted with a yellow border.

Status	Count
Returned	0
Not Submitted	0
Awaiting Approval	0
Pending Payment	0
View All Active	0
Denied	0
Paid	8

Create Expense Report

Complete the **General Information** ("Header") section:

The screenshot shows the 'Expense Report' form. The 'General Information' section is highlighted with a yellow border. It contains the following fields:

- *Business Purpose: Training (dropdown menu)
- *Description: Expense Report Training (text input)
- *Default Location: CAN (dropdown menu with search icon)
- Reference: (empty text input)

On the right side of the General Information section, there are two sections:

- Add Header Attachment (with a right arrow)
- Default SpeedCode to Charge Expenses (with a right arrow)

Below these sections, the Creation Date is 11/01/2020 and the user is Lillianne Ross. The Updated on date is also 11/01/2020.

The 'Expense Details' section below shows a message: 'No expenses have been entered.' and a green button labeled '+ Add Expense'. A warning box states: '! Business Purpose, Description, and Default Location are required before adding attachments, speedcodes, or expense receipts !'

Select the **Business Purpose** from the drop down menu.

Enter an applicable **Description**.

Select the **Default Location** – this should be the location where most of your purchases were made (you can update the location on a particular line if needed in the Expense Details section).

If desired, add a **Reference** for internal purposes – this field is not mandatory.

Add attachments to the **Add Header Attachment** section. There is also an option to attach receipts to each expense line in the Expense Details section.

Enter the **Default SpeedCode to Charge Expenses** – this should be the speedcode where most of your purchases will be charged (you can update the speedcode on a particular line if needed in the Expense Details section). Entering the speedcode will automatically populate the Fund, Department, and Program or Project chart fields.

Cancel

Expense Report Defaults

Done

Description Expense Training

Accounting Details

GL ChartFields

Show All

%	*GL Unit	Speed Code	Fund	Dept	Program	Project
+ -	100.00 UWO		1		00000	

! You must enter a speedcode before submitting your expense report as this information is required to route your claim for approval !

Enter *Expense Details*:

Expense Reports

Expense Report

Report NEXT

Lillianne Ross

General Information

*Business Purpose

Training

*Description

Expense Report Training

*Default Location

CAN

Reference

Add Header Attachment

Default SpeedCode to Charge Expenses

Creation Date

11/01/2020

Lillianne Ross

Updated on

11/01/2020

Expense Details

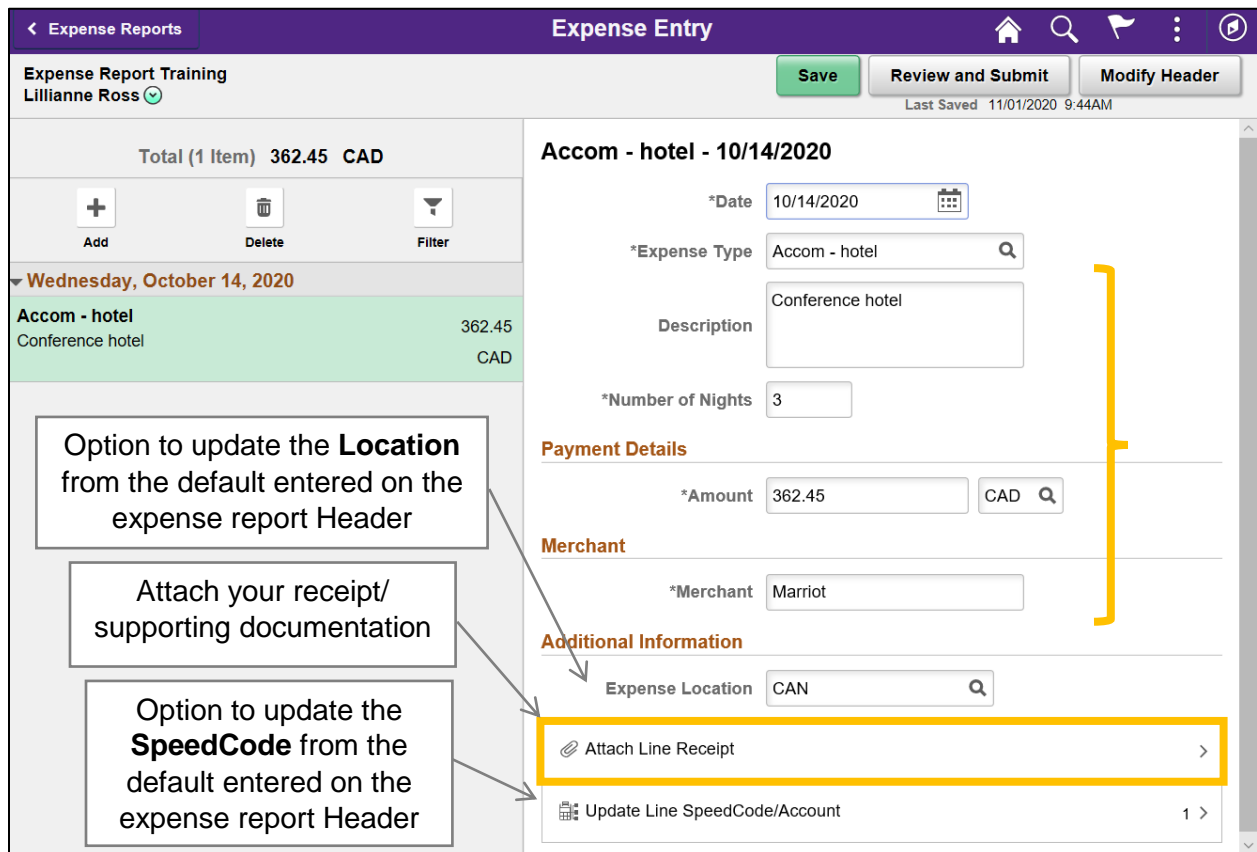
No expenses have been entered.

+ Add Expense

Enter the receipt **Date** and select the **Expense Type** using the magnifying glass icon:

The screenshot displays the 'Expense Entry' interface. At the top, there's a purple header with 'Expense Reports' and 'Expense Entry' tabs. Below the header, the user's name 'Lillianne Ross' is shown. The main area is divided into two sections. The left section shows a summary: 'Total (1 Item) 0.00 CAD' and a list of expenses for 'Sunday, November 01, 2020', including a 'New Expense' for 0.00. The right section is titled 'New Expense - 11/01/2020' and contains fields for '*Date' (set to 11/01/2020), '*Expense Type', and 'Description'. A yellow box highlights the date field, and a yellow circle highlights the magnifying glass icon next to the '*Expense Type' field. An arrow points from this icon to an 'Expense Type Search' dialog box. The dialog box has a 'Cancel' button and two tabs: 'Frequently Used' and 'All Types'. The 'All Types' tab is selected, showing a search bar and a list of 29 rows of expense types, including 'Accom - hotel', 'Accom - other's home allowance', and 'Airfare:Can-Intl (not US)'. The background form also shows a currency field set to 'CAD' and a 'Save' button.

The expense detail fields will populated based on the Expense Type selected:



Expense Reports | **Expense Entry** | Save | Review and Submit | Modify Header | Last Saved 11/01/2020 9:44AM

Expense Report Training
Lillianne Ross

Total (1 Item) 362.45 CAD

+ Add | - Delete | Filter

▼ Wednesday, October 14, 2020

Accom - hotel	362.45
Conference hotel	CAD

Option to update the **Location** from the default entered on the expense report Header

Attach your receipt/ supporting documentation

Option to update the **SpeedCode** from the default entered on the expense report Header

Accom - hotel - 10/14/2020

*Date 10/14/2020

*Expense Type Accom - hotel

Description Conference hotel

*Number of Nights 3

Payment Details

*Amount 362.45 CAD

Merchant

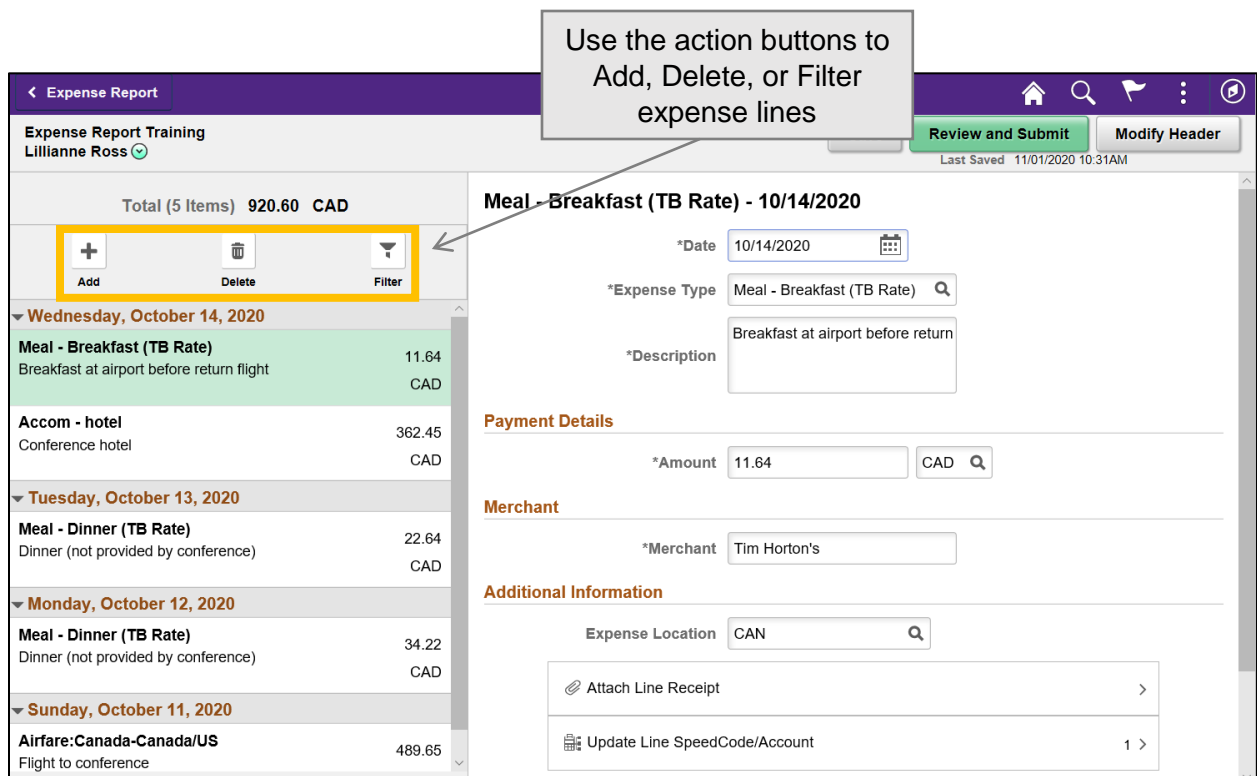
*Merchant Marriot

Additional Information

Expense Location CAN

Attach Line Receipt

Update Line SpeedCode/Account 1



Expense Report | Review and Submit | Modify Header | Last Saved 11/01/2020 10:31AM

Expense Report Training
Lillianne Ross

Total (5 Items) 920.60 CAD

+ Add | - Delete | Filter

▼ Wednesday, October 14, 2020

Meal - Breakfast (TB Rate)	11.64
Breakfast at airport before return flight	CAD
Accom - hotel	362.45
Conference hotel	CAD

▼ Tuesday, October 13, 2020

Meal - Dinner (TB Rate)	22.64
Dinner (not provided by conference)	CAD

▼ Monday, October 12, 2020

Meal - Dinner (TB Rate)	34.22
Dinner (not provided by conference)	CAD

▼ Sunday, October 11, 2020

Airfare:Canada-Canada/US	489.65
Flight to conference	

Use the action buttons to Add, Delete, or Filter expense lines

Meal - Breakfast (TB Rate) - 10/14/2020

*Date 10/14/2020

*Expense Type Meal - Breakfast (TB Rate)

*Description Breakfast at airport before return

Payment Details

*Amount 11.64 CAD

Merchant

*Merchant Tim Horton's

Additional Information

Expense Location CAN

Attach Line Receipt

Update Line SpeedCode/Account 1

Review and Submit

Click **Save** and review your claim for errors. Once corrected, click on **Review and Submit**:

The screenshot shows the 'Expense Entry' form for 'Expense Report Training' by Lillian Ross. The top navigation bar includes 'Expense Reports', 'Expense Entry', and a 'Save' button. The main content area is divided into two columns. The left column lists expenses by date: Wednesday, October 14, 2020; Tuesday, October 13, 2020; Monday, October 12, 2020; and Sunday, October 11, 2020. The right column shows details for the selected expense, 'Meal - Breakfast (TB Rate) - 10/14/2020'. A red box highlights the 'Expense Entry Errors' section, which states: 'Correct the following errors prior to submission: Enter the Merchant name below.' The 'Merchant' field is currently empty. Other fields include 'Date' (10/14/2020), 'Expense Type' (Meal - Breakfast (TB Rate)), 'Description' (Breakfast at airport before return), 'Amount' (11.64 CAD), and 'Expense Location' (CAN). Buttons for 'Save', 'Review and Submit', and 'Modify Header' are visible at the top right.

Date	Description	Amount	Unit
Wednesday, October 14, 2020	Meal - Breakfast (TB Rate)	11.64	CAD
	Breakfast at airport before return flight		
	Accom - hotel	362.45	CAD
	Conference hotel		
Tuesday, October 13, 2020	Meal - Dinner (TB Rate)	22.64	CAD
	Dinner (not provided by conference)		
Monday, October 12, 2020	Meal - Dinner (TB Rate)	0.00	CAD
	Dinner (not provided by conference)		
Sunday, October 11, 2020	Airfare:Canada-Canada/US	489.65	CAD
	Flight to conference		

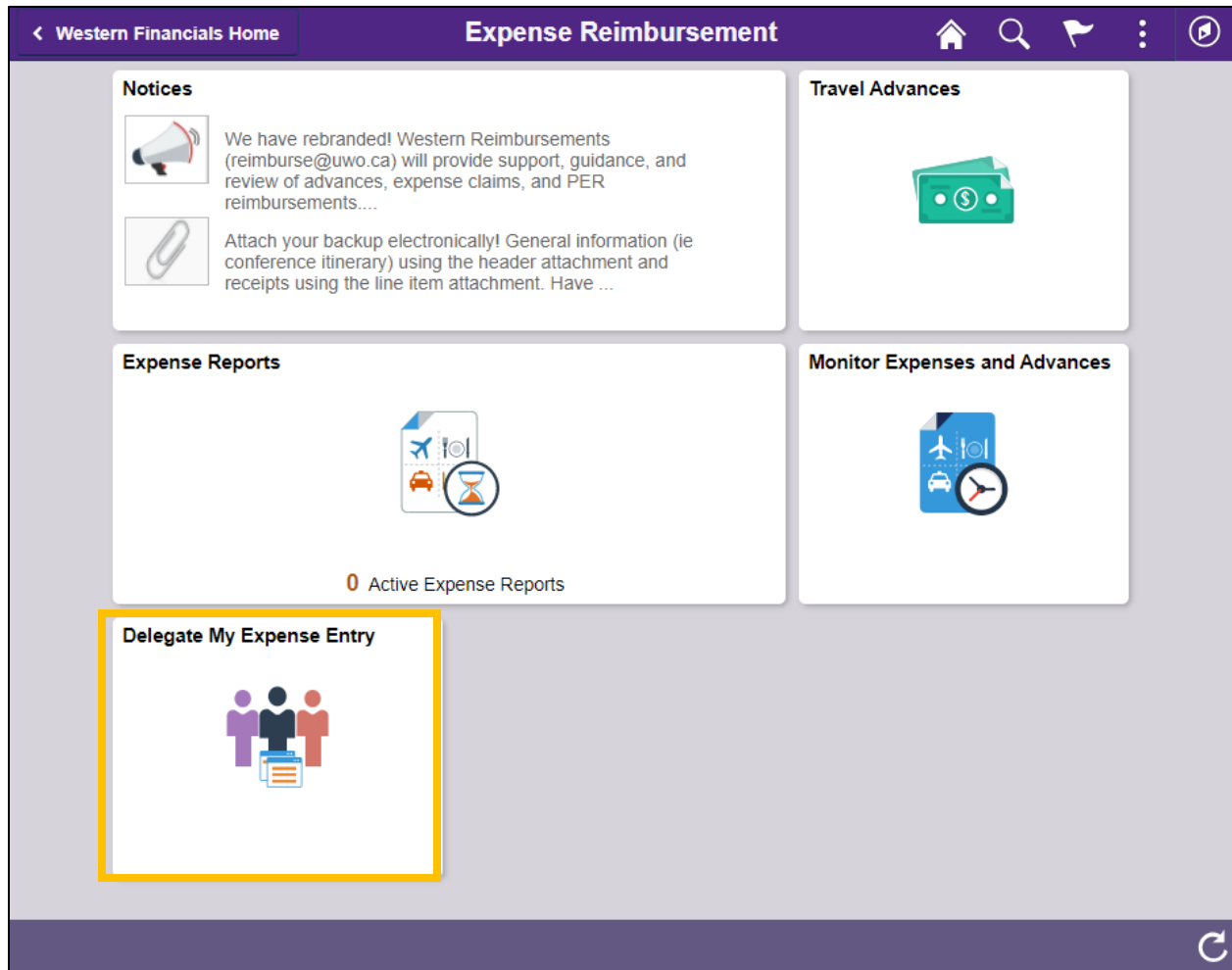
Add any additional information or documentation required for Research purposes in **Notes and Research Documentation** and click **Submit**:


The screenshot shows the 'Expense Summary' form for 'Expense Report Training' by Lillian Ross. The top navigation bar includes 'Expense Entry', 'Expense Summary', and a 'Submit' button. The main content area is divided into two columns. The left column shows the 'Expense Report Summary' with a total of 920.60 CAD. The right column shows the 'Approval Status' as 'Pending' with a report ID of E0246424. Below the summary, there is a section for 'Additional Information' with links to 'Notes and Research Documentation' and 'View Summary (PDF)'. A box labeled 'Printable PDF summary report' points to the 'View Summary (PDF)' link. Another box labeled 'Add additional information and required research documentation' points to the 'Notes and Research Documentation' link. Buttons for 'Update Details', 'Modify Header', and 'Submit' are visible at the top right.

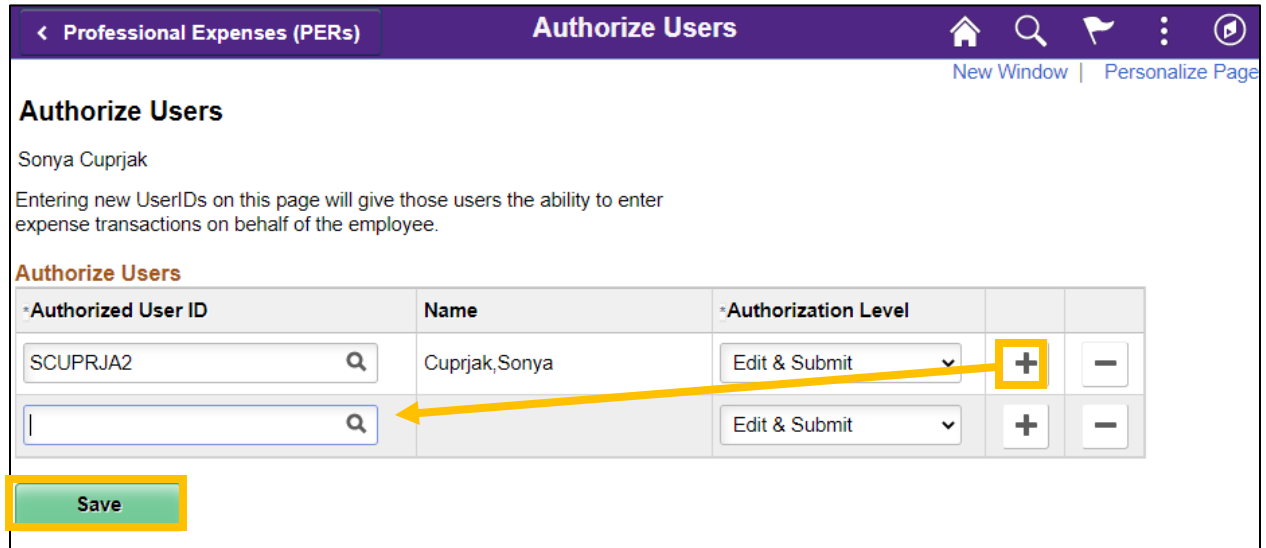
Category	Amount
Total (5 Items)	920.60 CAD
Due to Employee	920.60 CAD

How do I designate an Alternate Data Entry person to enter claims on my behalf?

Navigation: Western Financials Home Homepage → Expense Reimbursement Tile > Delegate My Expense Entry







Click on the  button to add a new row and enter the UserID (or search by clicking on the magnifying glass icon) of the employee you wish to give the ability to enter expense transactions on your behalf. Click **Save** to save.



Authorize Users


Sonya Cuprjak

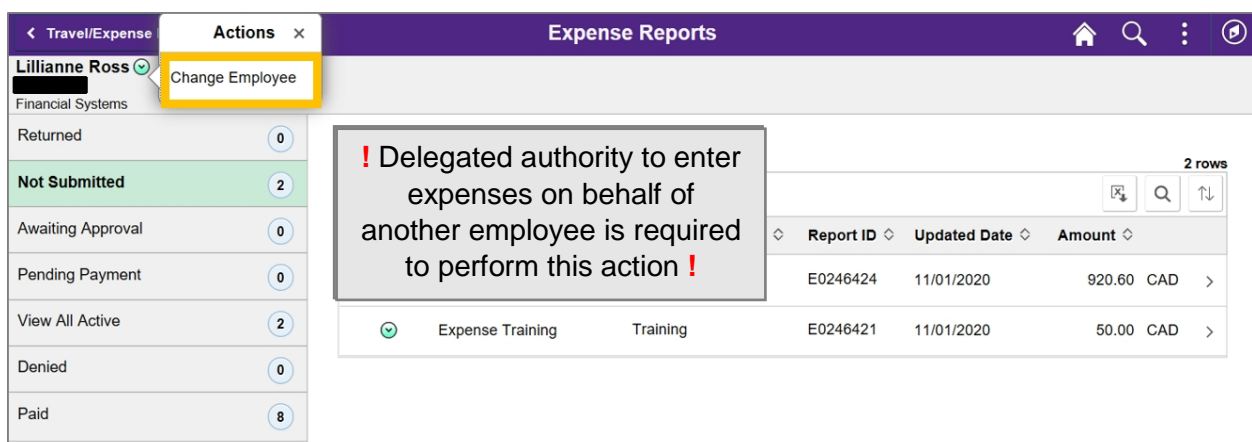
Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Authorized User ID	Name	Authorization Level		
SCUPRJA2	Cuprjak, Sonya	Edit & Submit		
		Edit & Submit		


Save

How do I submit an expense report on behalf of another employee?

On the **Expense Reimbursement** dashboard, click on the **Expense Reports** tile. Click on the green dropdown arrow  located next to your name and select the **Change Employee** action:



Expense Reports

Lillianne Ross 

Change Employee

Returned 0

Not Submitted 2

Awaiting Approval 0

Pending Payment 0

View All Active 2

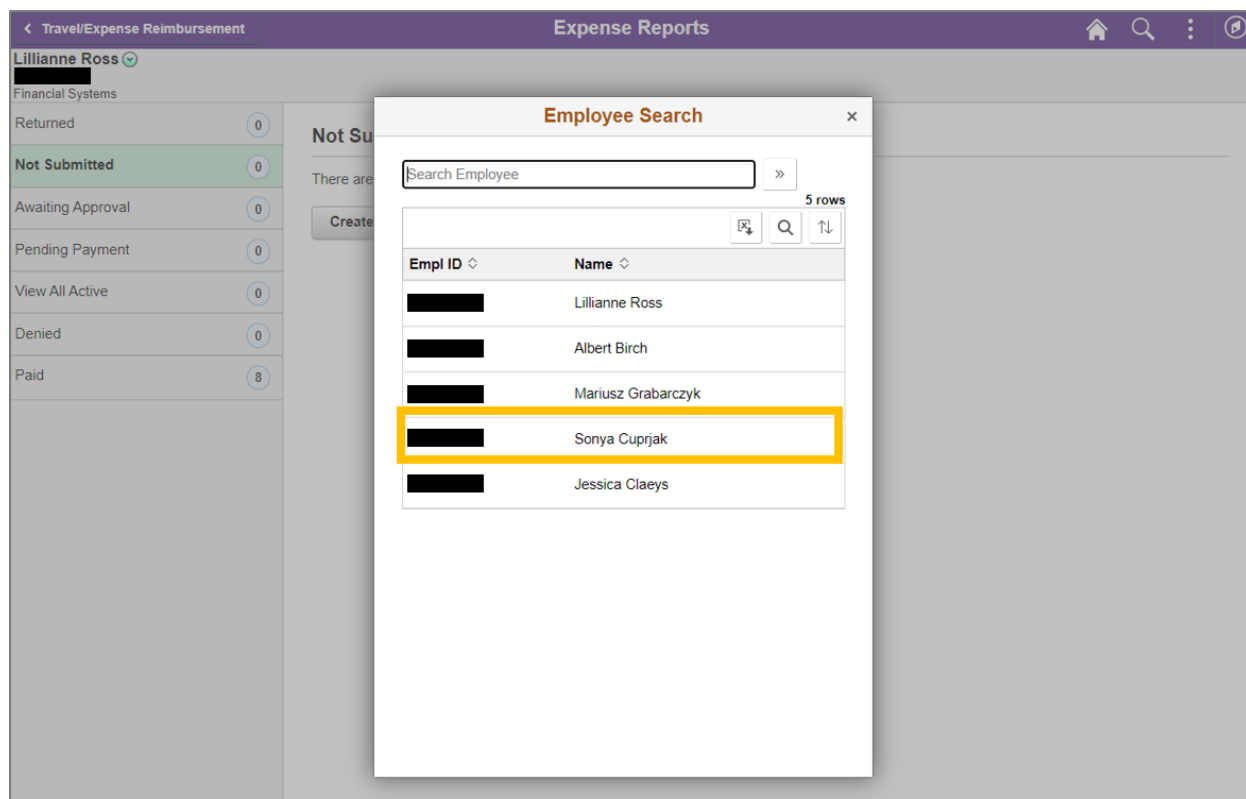
Denied 0

Paid 8

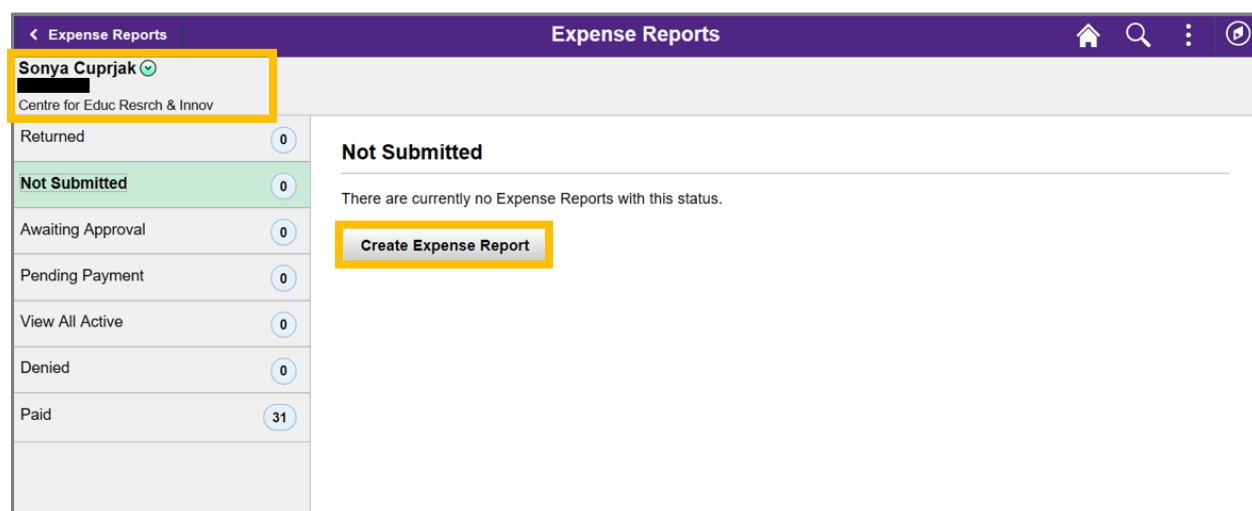
! Delegated authority to enter expenses on behalf of another employee is required to perform this action !

Report ID	Updated Date	Amount
E0246424	11/01/2020	920.60 CAD
E0246421	11/01/2020	50.00 CAD

Select the employee from the listing of users for which you have been delegated entry authority. You may either create a new claim or view a claim in process on behalf of that employee.

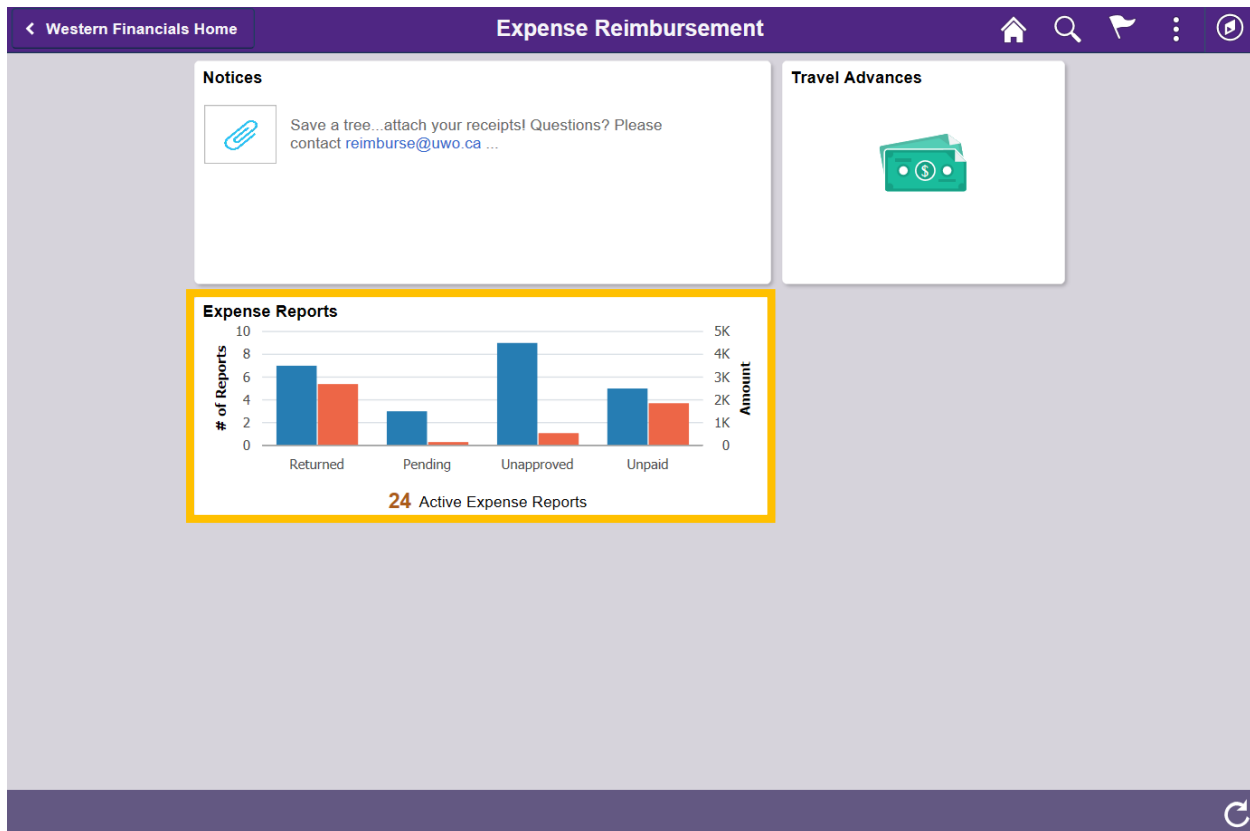


Click **Create Expense Report** to create an expense report on behalf of the other employee:



How do I view the status of my Expense Claim? What about my past Expense Claims?

Click on **Expense Reports** tile on the **Expense Reimbursement** dashboard:



The **Expense Reports** page will sort your claims by status and default on the row of your pending expense report (Returned/Not Submitted). Click on another row to view your active or past expense reports.

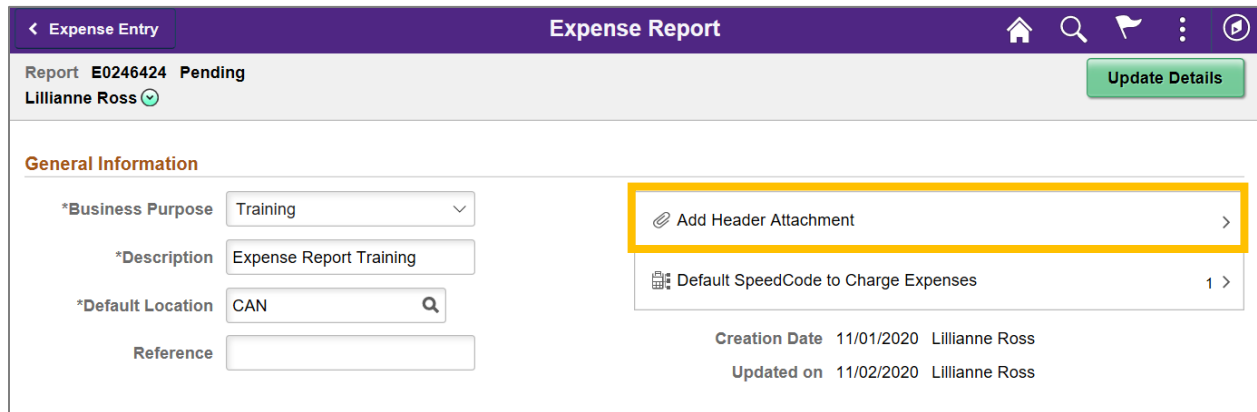
The screenshot shows the 'Expense Reports' page. On the left, there's a sidebar with a list of statuses: Returned, Not Submitted, Awaiting Approval, Pending Payment, View All Active, Denied, and Paid. The 'Not Submitted' status is highlighted in green. To the right of the sidebar, there's a table showing the details of the 'Not Submitted' report. The table has columns for Actions, Description, Business Purpose, Report ID, Updated Date, and Amount. The first row shows a report for 'Expense Report Training' with a status of 'Not Submitted'.

Status	Count
Returned	0
Not Submitted	1
Awaiting Approval	1
Pending Payment	0
View All Active	2
Denied	0
Paid	8

Actions	Description	Business Purpose	Report ID	Updated Date	Amount
	Expense Report Training	Training	E0246424	11/01/2020	920.60 CAD

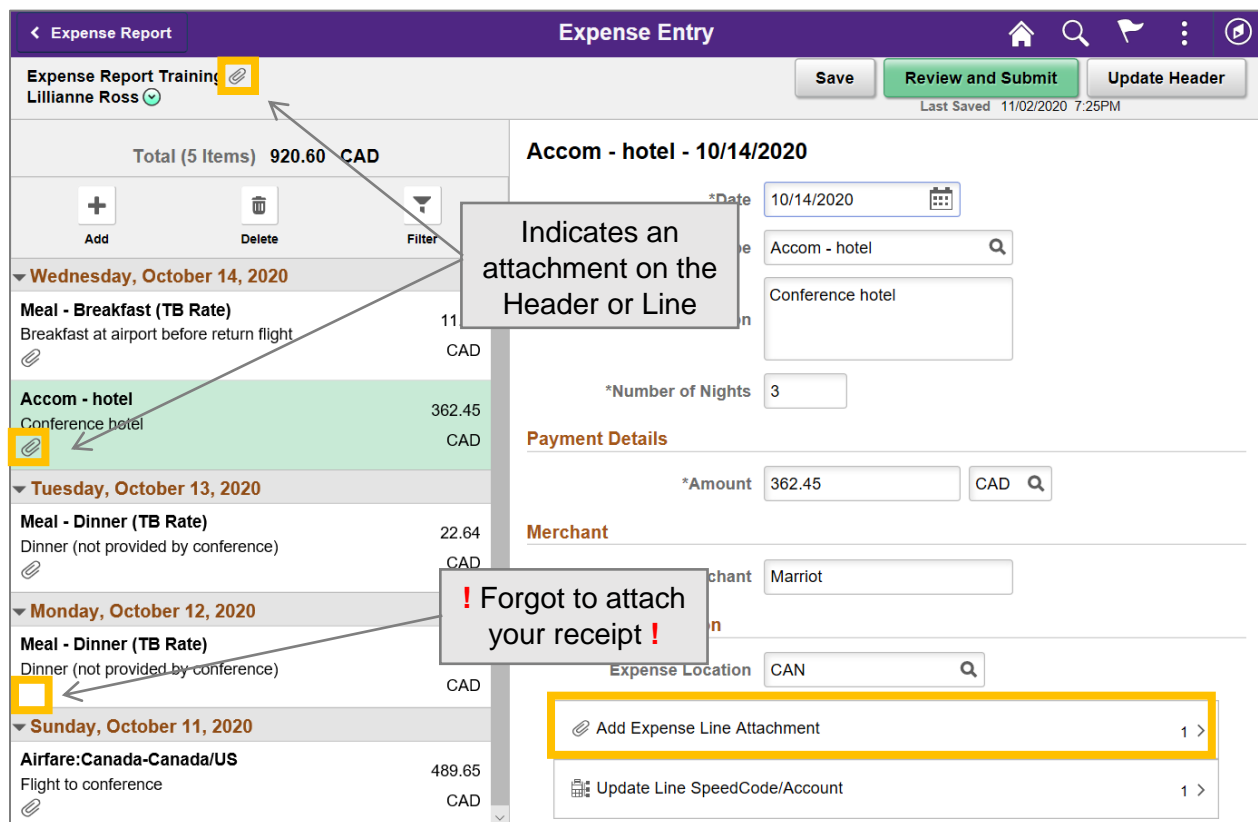
Where do I attach receipts and other supporting documentation to my expense report?

Attachments of any type (pdf, image, Word, Excel, etc.) may be added to your expense report at the **Header (General Information)** level or at the **Line (Expense Details)** level:



This screenshot shows the 'Expense Report' header section. The report is titled 'Expense Report Training' and is in 'Pending' status, submitted by 'Lillianne Ross'. The 'General Information' section includes fields for Business Purpose (Training), Description (Expense Report Training), Default Location (CAN), and a Reference field. To the right, there are two attachment options: 'Add Header Attachment' and 'Default SpeedCode to Charge Expenses'. The creation and update dates are both 11/01/2020 and 11/02/2020 respectively, by Lillianne Ross. An 'Update Details' button is in the top right.

Expense Report	
Report E0246424 Pending	Update Details
Lillianne Ross	
General Information	
*Business Purpose	Training
*Description	Expense Report Training
*Default Location	CAN
Reference	
Add Header Attachment	
Default SpeedCode to Charge Expenses 1	
Creation Date	11/01/2020 Lillianne Ross
Updated on	11/02/2020 Lillianne Ross

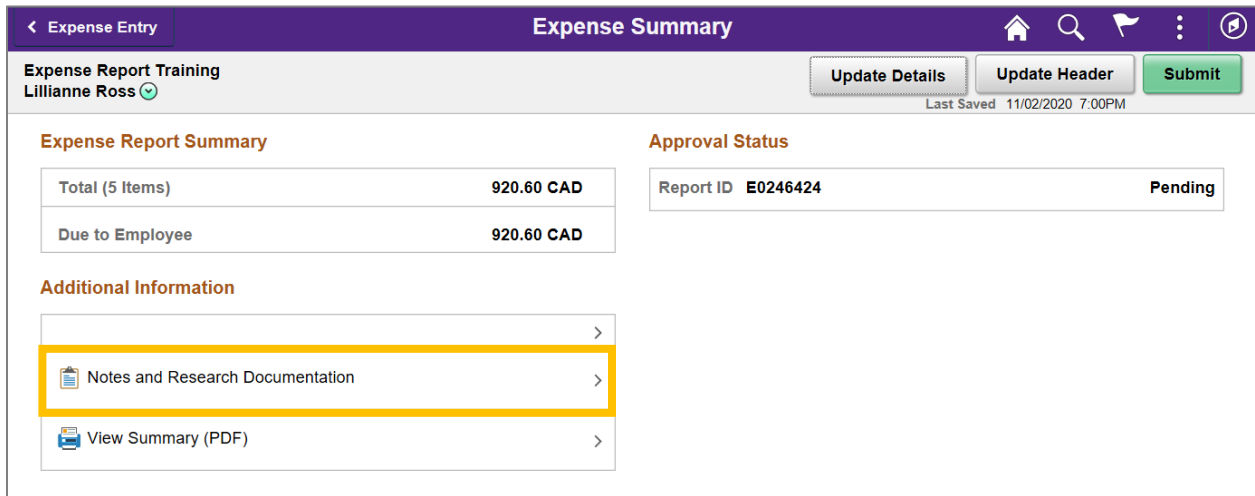


This screenshot shows the 'Expense Entry' section with a list of line items. Annotations highlight where attachments can be added. A callout box points to the header area, stating 'Indicates an attachment on the Header or Line'. Another callout box points to the 'Accom - hotel' line item, stating '! Forgot to attach your receipt !'. The line items include dates from Wednesday, October 14, 2020, to Sunday, October 11, 2020, with descriptions like 'Meal - Breakfast (TB Rate)', 'Accom - hotel', 'Meal - Dinner (TB Rate)', and 'Airfare: Canada-Canada/US'. The total is 920.60 CAD. The right side shows details for the 'Accom - hotel' line item, including date, location, number of nights, and payment details. An 'Add Expense Line Attachment' button is highlighted at the bottom right.

Expense Entry	
Expense Report Training Lillianne Ross	
Total (5 Items) 920.60 CAD	
Add Delete Filter	
Wednesday, October 14, 2020	
Meal - Breakfast (TB Rate) Breakfast at airport before return flight 11 CAD	
Accom - hotel Conference hotel 362.45 CAD	
Tuesday, October 13, 2020	
Meal - Dinner (TB Rate) Dinner (not provided by conference) 22.64 CAD	
Monday, October 12, 2020	
Meal - Dinner (TB Rate) Dinner (not provided by conference) CAD	
Sunday, October 11, 2020	
Airfare: Canada-Canada/US Flight to conference 489.65 CAD	
Accom - hotel - 10/14/2020	
Date 10/14/2020	
Location Accom - hotel	
Conference hotel	
Number of Nights 3	
Payment Details	
Amount 362.45 CAD	
Merchant Marriot	
Expense Location CAN	
Add Expense Line Attachment 1	
Update Line SpeedCode/Account 1	

Where do I add a note or explain how my expenses support research (for reports charged to a research project)?

On the **Expense Summary** page, click on Notes and Research Documentation:



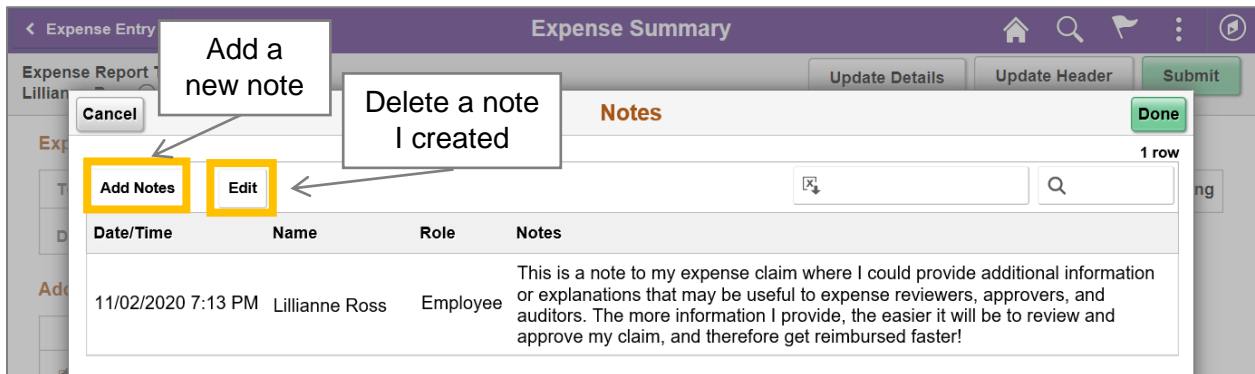
The screenshot shows the 'Expense Summary' page for 'Expense Report Training' by Lillianne Ross. The page has a purple header with navigation icons and buttons for 'Update Details', 'Update Header', and 'Submit'. The 'Expense Report Summary' section shows a total of 920.60 CAD. The 'Approval Status' section shows a pending report with ID E0246424. The 'Additional Information' section contains a list with 'Notes and Research Documentation' highlighted by a yellow box, and 'View Summary (PDF)'.

Expense Report Summary	
Total (5 Items)	920.60 CAD
Due to Employee	920.60 CAD

Approval Status	
Report ID	E0246424
Status	Pending

Additional Information

- Notes and Research Documentation
- View Summary (PDF)



The screenshot shows the 'Expense Summary' page with the 'Notes' modal open. The modal has a title bar with 'Cancel', 'Add a new note', 'Delete a note I created', and 'Done' buttons. The 'Add Notes' and 'Edit' buttons are highlighted with yellow boxes. The modal contains a table with one row of notes.

Date/Time	Name	Role	Notes
11/02/2020 7:13 PM	Lillianne Ross	Employee	This is a note to my expense claim where I could provide additional information or explanations that may be useful to expense reviewers, approvers, and auditors. The more information I provide, the easier it will be to review and approve my claim, and therefore get reimbursed faster!

Can I edit a Note on my expense report?

Unfortunately, once a note has been added it cannot be modified. The only option is to delete the unwanted note and add a new one.

The top screenshot shows the 'Notes' modal with the following data:

Date/Time	Name	Role	Notes
11/02/2020 7:13 PM	Lillianne Ross	Employee	This is a note to my expense claim where I could provide additional information or explanations that may be useful to expense reviewers, approvers, and auditors. The more information I provide, the easier it will be to review and approve my claim, and therefore get reimbursed faster!

The bottom screenshot shows the 'Notes' modal with the following data:

Date/Time	Name	Role	Notes
<input checked="" type="checkbox"/> 11/04/2020 12:25 PM	Lillianne Ross	Employee	This is a note to my expense claim where I could provide additional information or explanations that may be useful to expense reviewers, approvers, and auditors. The more information I provide, the easier it will be to review and approve my claim, and therefore get reimbursed faster!

If I attach my receipts to my expense claim, what do I do with my “originals”?

If you choose to attach receipts and other supporting documentation to your online claim, the expense report Reviewers and Approvers will view the supporting documentation online. Please retain your “originals” and destroy all paper or electronic copies of attachments one full year *after* the end of the fiscal year your expense report was paid.

At that time, the attachments will constitute the original documentation for your expense claim.

For questions about these requirements or timeline, please contact reimburse@uwo.ca or x85499.

How do I apply a cash advance?

Before submitting your expense report, click on **Cash Advance** from the Expense Report Summary page:

The screenshot displays the 'Expense Summary' page. At the top, there's a navigation bar with a back arrow, 'Expense Entry', and the title 'Expense Summary'. Below this, the user's name 'My Conference Jessica Claeys' is shown, along with buttons for 'Update Details', 'Update Header', and 'Submit'. A 'Last Saved' timestamp of '11/09/2020 2:46PM' is visible.

The main content area is divided into three sections:

- Expense Report Summary:** A table showing 'Total (1 Item)' as 500.00 CAD and 'Due to Employee' as 500.00 CAD.
- Approval Status:** A box showing 'Report ID E0246431' and a status of 'Pending'.
- Additional Information:** A list of items with expandable arrows. The first item, 'Cash Advance', is highlighted with a yellow box. It shows 'Outstanding Cash Advance' as 300.00 CAD. Below it are 'Notes and Research Documentation' and 'View Summary (PDF)', both with expandable arrows.

Enter the amount to apply to your expense report and click **Apply**:

Apply Cash Advance

Cancel

Apply

Total (1 Item)

500.00 CAD

Advance Applied

300.00 CAD

Due to Employee

200.00 CAD

Cash Advance Information

Description	Advance ID	Advance Amount	Balance	Total Applied
Test	A0015071	1000.00	0.00 CAD	300.00 CAD

The amount of the **Advance Applied** will be deducted from the Total to arrive at the amount **Due to Employee**:

Expense Entry

Expense Summary

My Conference
Jessica Claeys

Update Details

Update Header

Submit

Last Saved 11/09/2020 2:51PM

Expense Report Summary

Total (1 Item)

500.00 CAD

Advance Applied

300.00 CAD

Due to Employee

200.00 CAD

Approval Status

Report ID E0246431

Pending

Additional Information

Cash Advance

Applied Amount 300.00 CAD

Outstanding Cash Advance 0.00 CAD

Notes and Research Documentation

View Summary (PDF)

17

Is there a summary page where I can see all expense lines, accounting information, notes, and attachments in one place?

On the Expense Summary page, click on **View Summary (PDF)**:

Expense Summary

Expense Report Training
Lillianne Ross ✓

Update Details Update Header Submit

Last Saved 11/02/2020 7:00PM

Expense Report Summary

Total (5 Items)	920.60 CAD
Due to Employee	920.60 CAD


Approval Status

Report ID E0246424 Pending

Additional Information

- >
- Notes and Research Documentation >
- View Summary (PDF) >**

The following PDF report will be generated that will list all expense lines, accounting information (speedcode), approvers, notes, and attachments:



Expense Report

Name Lillianne Ross

Employee ID [REDACTED]

Submission Date 2020-11-05

Submitted By Lillianne Ross

E0246424

Description Expense Report Training

Business Purpose Training

Reference

Expense Details

Reimbursable Expenses

Line	Date	Expense Type	Loc	Merchant	Amount	Currency	Amount (CAD)
1	2020-10-14	Accom - hotel	CAN	Marriot	362.45	CAD	362.45
2	2020-10-11	Airfare:Canada-Canada/US	CAN	Air Canada	489.65	CAD	489.65
3	2020-10-12	Meal - Dinner (TB Rate)	CAN	McKelvie's	34.22	CAD	34.22
4	2020-10-13	Meal - Dinner (TB Rate)	CAN	Darrell's	22.64	CAD	22.64
5	2020-10-14	Meal - Breakfast (TB Rate)	CAN	Marriott	11.64	CAD	11.64
Total Reimbursable Expenses							920.60
Total Expenses							920.60
Cash Advances Applied							0.00
Total Due to Employee							920.60

Expenses will be Charged to the Following:

Business Unit	Fund	Department	Program	Project	Account	SpeedCode	Amount (CAD)
UWO	1	[REDACTED]	00000		645000	[REDACTED]	920.60
Total							920.60

Approval Workflow

Your claim has not been submitted!
Please contact x85499 or reimburse@uwo.ca if you require assistance.

Notes and Research Documentation

This is a note to my expense claim where I could provide additional information or explanations that may be useful to expense reviewers, approvers, and auditors. The more information I provide, the easier it will be to review and approve my claim, and therefore get reimbursed faster!

Thanks for the explanation, Lilly!

Please update speedcode to [REDACTED]

Please update speedcode to [REDACTED]

Lillianne Ross

Albert Birch

Jessica Claeys

Jessica Claeys

Attachments

Using Attachments?
Attach receipts and other supporting documentation to your online claim. Once submitted, the individuals in the Approval Workflow will review documentation online. Please destroy any other paper or electronic copies of attachments one full year *after* the end of the current fiscal year. At this time, the attachments will constitute original documentation for your expense claim.

Submitting Paper Documentation?
Attach receipts and other supporting documentation to this cover page and forward to the first individual in the Approval Workflow above. Once the expense claim is fully approved, please forward all original receipts to Financial Services Reimbursements, Support Services Building, Suite 6100.

E0246424

Page 1 of 2

Expense Report

E0246424

Name	Lillianne Ross	Description	Expense Report Training
Employee ID	██████████	Business Purpose	Training
Submission Date	2020-11-05	Reference	
Submitted By	Lillianne Ross		

Attachments

Header	Authorization to attend conference.pdf
Line 1	Marriot Receipt and Proof of Payment.pdf
Line 2	Airline receipt (received electronically by email).pdf
Line 4	Dinner receipt (photo taken with my phone).PNG
Line 5	Breakfast receipt.PNG

! Click on an attachment to open (requires Western user name and password) !

Using Attachments?

Attach receipts and other supporting documentation to your online claim. Once submitted, the individuals in the Approval Workflow will review documentation online. Please destroy any other paper or electronic copies of attachments one full year after the end of the current fiscal year. At this time, the attachments will constitute original documentation for your expense claim.

Submitting Paper Documentation?

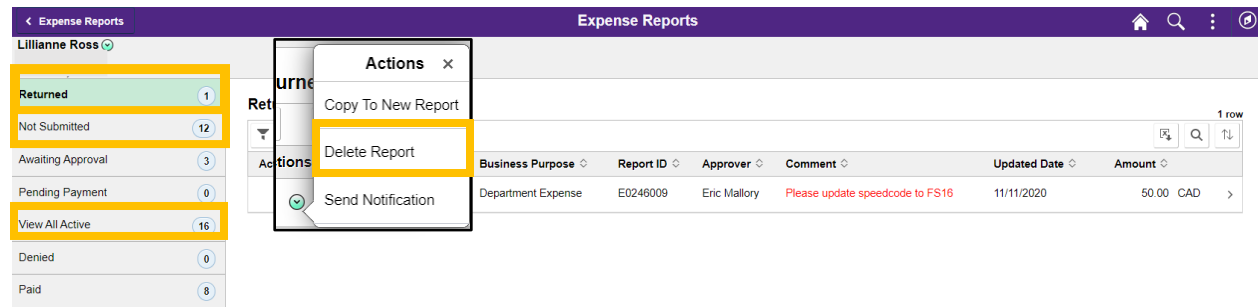
Attach receipts and other supporting documentation to this cover page and forward to the first individual in the Approval Workflow above. Once the expense claim is fully approved, please forward all original receipts to Financial Services Reimbursements, Support Services Building, Suite 6100.

E0246424

How do I delete an expense report?

Please note, you can only delete an expense reimbursement claim that has an *unsubmitted/pending* status. Unsubmitted/pending claims will sit in the **Returned** and **Not Submitted** (or View All Active) rows in the My Expense Reports module.

To delete your report, click on the green arrow button sitting under the Action column to the left of your claim to open the **Actions** menu. Click **Delete Report** to delete your report:



How are expense reports routed for approval?

Expense reports are routed based on **where** the claim is charged. The Department portion of the speedcode will determine the workflow in the below order:

1. Reviewer (optional based on Department)
2. Grant Holder (required for expenses charged to Fund 2 – Research)
3. Department Approver (required)

Are there any exceptions to the workflow?

There are certain Western and Broader Public Sector directives which will alter the approval workflow of your expense report:

Q. Do you have a Supervisor added to your profile?

A. Yes:

Regardless of where your expenses are charged, your claim will also route to the Supervisor on your profile. This is an additional level of approval based on who you are and is required in certain circumstances.

Q. Are you a Department Approver submitting a claim?

A. Yes, and I have a Supervisor added to my profile:

1. Reviewer (optional based on Department)
2. Grant Holder (required for expenses charged to Fund 2 – Research)
3. Supervisor

A. Yes, but I do not have a Supervisor added to my profile:

1. Reviewer (optional based on Department)
2. Grant Holder (required for expenses charged to Fund 2 – Research)
3. Expense Department Head

Q. Are you an Expense Department Head submitting a claim?

A. Yes:

1. Reviewer (optional based on Department)
2. Grant Holder (required for expenses charged to Fund 2 – Research)
3. Supervisor

Q. Are you a Grant Holder submitting a claim against your project?

A. Yes, and I'm also a Department Approver or Expense Department Head:

1. Reviewer (optional based on Department)
2. Supervisor

A. Yes, but I do not have a Supervisor added to my profile:

1. Reviewer (optional based on Department)
2. Department Approver (required)

A. Yes, and I have a Supervisor added to my profile:

1. Reviewer (optional based on Department)
2. Department Approver (required)
3. Supervisor

Q. I don't seem to fit into any of these circumstances. Where can I get more information?

A. Please contact finsys@uwo.ca for questions about expense approval workflow.