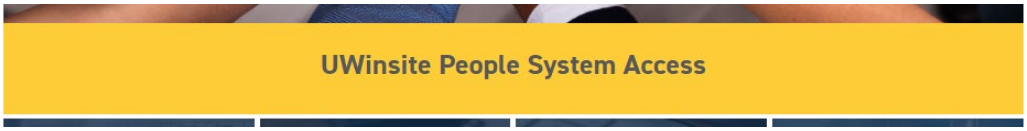
Education
University of Windsor

UNIVERSITY OF WINDSOR, FACULTY OF EDUCATION
FINANCIAL PROCEDURES – Revised September 2025

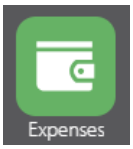
In your browser, go to UWinsite People. Complete your single sign-on in UWinsite People using your full **UWinID@uwindsor.ca** as your username and your UWin Account password. Then:

Delegate Authority Knowledge Based Article - How to delegate authority

1. For expense reimbursements, you can delegate access to the Secretary, Dean's Office, to submit reimbursement claims on your behalf. In your browser, go to UWinsite People. Complete your single sign-on in UWinsite People using your full **UWinID@uwindsor.ca** as your username and your UWin Account password.

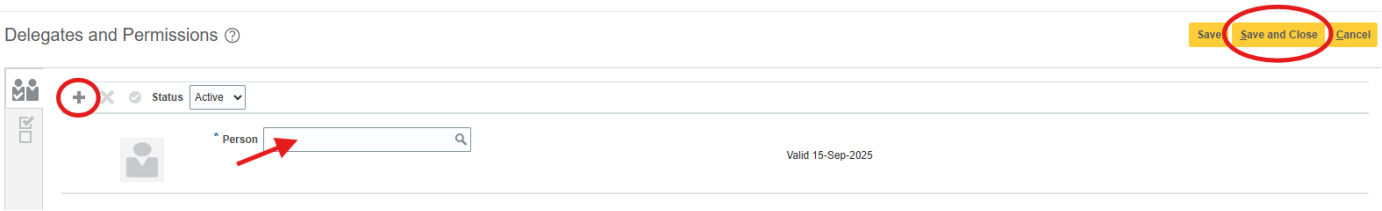


2. On your Home Page, click on the 'house' icon across the top menu bar, which will take you to your main portals. Click on the 'Expenses' module



3. Click on the 'gear' icon ('Go to Task') on the far right, click on 'Manage Delegates'

4. Click on the + (Add) button, start typing in capital letters the name of the person you wish to delegate, and a list will be displayed, and the appropriate individual can be selected. Click on person's name and click 'Ok', 'Save and Close'



Please note: If you are charging any expenses or invoices to a grant, then you must contact Research Finance and advise them that you require the delegated person to be added to the grant to have the authority to prepare the expense report using a grant on your behalf. Until this step is done, the delegated person will not have access to do act on your behalf using a grant.

Travel Expenses

1. Download and complete the Faculty of Education's internal travel expense claim spreadsheet found at this link Faculty of Education's Internal Travel Expense Reimbursement Form. Include any per diems and the dates that you will be claiming (breakfast, lunch, dinner). Please note, item 8.4 of the updated UWindsor Travel Policy University of Windsor Travel Policy Incidental expenses must be supported by an original, itemized receipt in order to be eligible for reimbursement. Blanket per diem claims for incidental expenses are not permitted.
2. Scan all receipts individually and name the files according to the expense type (i.e. hotel receipt; taxi 1 receipt; taxi 2 receipt; boarding pass; train ticket receipt; etc.)
3. Save an electronic copy of the agenda / itinerary and any other related documentation that supports the purpose of the trip.
4. Email all documentation to your delegate.
5. Your delegate can prepare the expense report and enter it into the finance system for processing. You will receive an email asking for your approval. Once approved, the expense report will move to the next approval levels. If there are any errors in the expense report, you can 'reject' the report and it will be returned to your delegate for amendment and resubmission.

Other Expense Reimbursements

1. For other expense reimbursements, download and complete the Faculty of Education's internal travel expense claim spreadsheet found at this link Faculty of Education's Internal Other Expense Reimbursements Form.
2. Scan all receipts individually and name the files according to the expense type (i.e. Computer; Book; candidate lunch; etc.).
3. If it is an entertainment expense (i.e. candidate lunch) or expenses relating to a workshop or conference you are hosting, you must save an electronic copy of the flyer, agenda, itinerary, and/or any other related documentation that supports the expense(s). For meal reimbursements, you must include the names of all parties in attendance.

Paying Invoices

To pay an invoice using a grant, you can email the invoice to be paid to your delegate, indicating the grant account it should be charged to, and the invoice can be submitted as a Purchase Requisition for processing and payment. You must have access to the 'Purchase Requisitions' portal under the 'Procurement' tab to submit an invoice. The account string will consist of the following information:

Fund	Dept	Program	Project	Natural	Classif.
xx	1100	xxxxx	xxxxxx	default	xxx

Fund - use 08 for grant; use 01 for faculty operating account (PD Funds)
Dept - Default is 1100 is for Education
Program - use 00000 for grant; use 11000 for faculty operating account (PD Funds)
Project - use your grant number for a grant; use 000000 for faculty operating account (PD Funds)

Natural – this will default based on what the item is
Classification - use 000 for everything except for PD Funds put "PDF"

How to Update or Add Banking Information

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1. In Me, under Quick Actions in the left hand-side menu, scroll down and select Show More.

2. Navigate to the Pay section, select Payment Methods.

3. Under Bank Accounts you can
   - Edit existing banking information:
     - If you already have banking information on file, it will be displayed. To make changes, select pencil icon and edit necessary fields. Please ensure to select the Active check box to make this bank account active for payroll. You can only have one bank account active for Payroll at a time. When complete, select Save.
   - Add new banking information:
     - Select the +Add button. Enter in the bank account number and bank transit number (sometimes referred to as branch number). To make this new bank account active for payroll, select the Active check box select. When complete, select Save.

Please note that you can add up to two active bank accounts to your profile; however, payroll cannot be split between them. Your full pay will be deposited into a single designated account.

To change the bank account where your pay is deposited, navigate to My Payment Methods and click the pencil icon to edit. From the Bank Account drop down menu, select the account you wish to designate as your main account, then click Save to confirm the changes.