UNIVERSITY OF WINDSOR
FACULTY OF EDUCATION
FINANCIAL PROCEDURES

All faculty and staff have access to the UWinsite Finance system to submit their own travel advance requests and expense reimbursement claims. **Training** (one-on-one) is provided by finance staff to assist you – use these booking links to schedule a session.

To submit your own claims, you can find some detailed instructions at these links on our website as well:

UWinsite Expense Training 2026
UWinsite Expenses Checklist
UWinsite Travel Advance Instructions
Uwindsor Travel Policy

To request Dean's office Staff to assist in submitting expense claims or advances:

If you find yourself struggling with a travel advance or expense claim submission, the Dean's Office staff can assist with submission on your behalf. Please ensure that you have provided the necessary delegation (**How to Delegate Authority to complete Expense Reports on my Behalf**)

Please note: If you are charging any expenses or invoices to a grant, 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.

Pre-Approval Requirement for Travel and Hospitality Expenses:

All expenditures related to travel and hospitality, regardless of the ultimate source of funding, unless specifically indicated otherwise by the funding source, must be approved in advance by the Authorizing Officer and One-Up Approver (Dean) prior to incurring any expenses.

To ensure consistency and compliance, the Faculty has implemented a standardized pre-approval process:

i. **Complete the appropriate Pre-Approval Form (Travel / Hospitality), including:**
   - Purpose of travel / guest name and reason / gift cards for research project / etc.
   - Estimated costs
   - Funding source(s) (PD funds, grant(s), or combination)
   - Any other details relevant to the request

ii. **For grant-funded travel/hospitality expenses:**
    - Include grant/project number (multiple if splitting costs)
    - Confirm with Research Finance that funds are available and expenses are eligible
iii. **Attach a piece of supporting documentation:**
    - Conference flyer, agenda, or invitation/email confirming purpose
iv. **Submit for approval:**
    - Email all materials to deanofed@uwindsor.ca
    - Approval must be received prior to booking or payment

Travel Advance Requests (only allowed if using a UWindsor Travel Credit Card)

Once you've received travel pre-approval, a travel advance can be helpful if you need to book and pay for travel expenses well in advance of your departure date and require reimbursement ahead of time to pay off the card.

If you wish office staff to enter the advance request on your behalf, please provide the following in one email:

- That you are requesting an advance and outline what expenses you are advancing
- Dates of travel
- Copies of the invoices/receipts for the expenses
- Copy/screenshot of the VISA transactions from Centresuite to prove the transactions were done on your Travel card
- Signed pre-approval form

When you return from the trip, you will still be required to complete an expense claim in UWinsite Finance. This claim will include entering the details of the expenses for which you received the advance and resubmitting those receipts, as well as any additional expenses incurred during the trip. This is to "clear" the advance and post those charges to the proper account.

Travel Expense Reimbursement

i. Complete the travel expense reimbursement form
    a. Located on the Faculty of Education Faculty Policies and Procedures website - Include any per diems (breakfast, lunch, dinner along with dates).
    Alternatively, you can include the relevant information in the body of an email if that is easier for you, but you must include:
        - Copy of travel pre-approval form
        - Dates of travel
        - Location and purpose of travel
        - Line by line account of what you are claiming and the amounts (include any per diem meals that weren't already provided by the conference/flight/train/hotel etc.)
        - Whether an advance was previously done for any of the expenses
        - Whether expenses for any other individuals are being reimbursed to you (i.e., group dinner) – need names and reason
        - The account number(s) that are being charged. If PD funds, just indicate PD funds.

ii. Organize receipts: save all receipts as separate files and label according to expense type (i.e. hotel receipt; taxi 1 receipt; taxi 2 receipt; boarding pass; train ticket receipt; etc.)
iii. Include supporting documentation: Save electronic copies of the conference/meeting agenda; travel itinerary and any other related documentation that supports the purpose of the trip.
iv. Submit your package: Email all documents (including the preapproval form) to your delegate in one email. Doing so helps ensure accuracy and completeness, and timely processing.
v. Your delegate will prepare the expense report and enter it into the finance system for processing. Once submitted, you will receive an email asking for your approval. Once approved, it will move through the required approval levels. If there are any errors in the expense report, you can 'reject' the report and it will be returned for amendment and resubmission.

Hospitality/Other Expense Reimbursement

i. For other expense reimbursements, download and complete the Other/Hospitality travel expense claim spreadsheet. Alternatively, you can also send an email but include a line-by-line account of all of the items, the reason/name, and the amounts in the body of the email.
ii. Organize receipts: save all receipts as separate files and label according to expense type (i.e. Computer; Book; candidate lunch; etc.)
iii. If it's 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.
iv. Email all documents, including the pre-approval form, to your delegate in one email to ensure accuracy and completeness, as well as timelier entry into the system.
v. Your delegate will 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 for amendment and resubmission.

Paying Invoices

i. To pay an invoice, please scan and forward the invoice to be paid to the Secretary, Dean's Office, indicating what it is for and the account it should be charged to. The account string will consist of the following information:

Fund	Dept	Program	Project	Natural	Classification
xx	1100	xxxxx	xxxxxx	default	xxx

Fund	08 for grant; 01 for faculty operating account (PD Funds)
Dept	1100 for Education
Program	00000 for grant; 11000 for faculty operating account (PD Funds)
Project	Grant number (start 8) for grant; 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"