

## Appendix D Approval Matrix for Claims for Reimbursement

Funding Source	Primary Approver (for all claims)	Secondary Approver (where claim exceeds \$5,000 Canadian equivalent)	Deadline	Form	Receipts
Operating, special purpose, ancillary, endowment, or capital fund	Person to whom the claimant reports	Assistant or Associate Vice-President or Vice-President	6 months	<a href="#">Claim for Reimbursement of Expenses</a>	Receipts supporting the Claim for Reimbursement are filed and stored in the local unit.
Research grant (internally funded)	Department Chair /Head or higher - and - Principal Investigator	Not required – Office of Comptroller will review	6 months	<a href="#">Claim for Reimbursement of Expenses</a>	Original receipts are filed and stored with the Claim for Reimbursement at the Office of the Comptroller.
Research grant (externally funded)	Department Chair /Head or higher - and - Principal Investigator	Not required – Office of Comptroller will review	15 months	<a href="#">Claim for Reimbursement of Expenses</a>	Original receipts are filed and stored with the Claim for Reimbursement at the Office of the Comptroller.
Professional Expense Reimbursement (PER)	One of the following individuals: <ul style="list-style-type: none"> <li>• Department Chair /Head;</li> <li>• Dean/Principal or designated Associate Dean /Principal;</li> <li>• University Librarian or designated Associate University Librarian;</li> <li>or</li> <li>• Vice-President Academic</li> <li>• <b>President</b></li> </ul>	Not required – Office of Comptroller will review	15 months	<a href="#">Professional Expense Reimbursement Form</a>	Original receipts are filed and stored with the Claim for Reimbursement at the Office of the Comptroller.
Professional Expense Reimbursement for Senior Scholar	Office of Comptroller	Not required	15 months	<a href="#">Professional Expense Reimbursement Form (Senior Scholars Only)</a>	Original receipts are filed and stored with the Claim for Reimbursement at the Office of the Comptroller.

### Universal Approval Rules:

- Where claimant is listed as a Primary Approver, then approval must be obtained from the person to whom the claimant reports.
- Claims and advances must be authorized by a signing authority on the cost centre(s) to be charged.