



Tipsheet for grantees: submitting an expense claim in EGrAMS for training and permanent equipment

Research Training Awards: group receipts by day and contact CCS research staff directly if you require a missing receipt affidavit. Eligible expenses include: 1) Conference registration fees; 2) Accommodations; and 3) Transportation and will not exceed the amount listed on the Notice of Award.

NOTE: If you have paid for the training yourself, you can direct the reimbursement to your address instead of the institution by PDF printing the claim form in EGrAMS and adding your own name and address with a note that the payment should go to you instead of the institution. Once this is done add it to the attachment section of the claim.

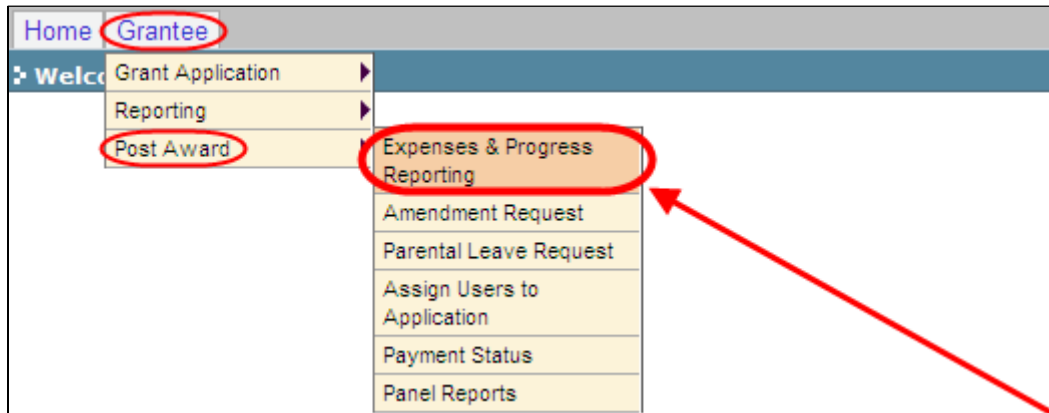
Permanent Equipment: include an invoice for the expense from your Host Institution and the invoices from the supplier to the institution. Both invoices are required to reimburse your equipment purchase.

Details regarding training and permanent equipment reimbursement are on the [CCS Financial Administration webpage](#).

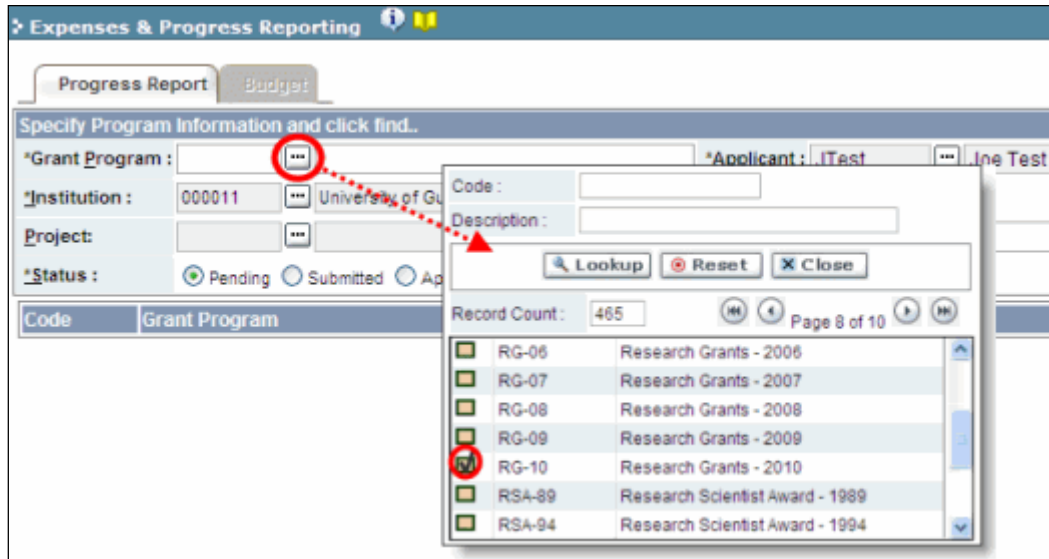
Research Training Awards training eligible expenses are noted in more detail [here](#).

Opening the report

1. Go to the [EGrAMS home page](#) and log in.
2. Go to **Expenses & Progress Reporting** in the menu:



3. Set the criteria for **Grant Program** by clicking the button and choosing the appropriate program from the lookup box:



4. Click the **Find** button at the bottom of the screen.
5. Locate the **Expense Claim** line item and click anywhere on the text to open the Expense Claim report:

Code	Grant Program	Project	Title	+Info					
Code	Description	Report Type	Report Freq.	Report Dt.	Grace Days	Submit Dt.	Review Notes	Status	Submit
E995	- Finance Approval is required to release funds.	...	Encumbrance	N/A	07/31/2009	0	...	Pending	
EXP	Expense Claim	...	Expenditure	N/A	10/09/2009	30	...	Pending	

To create and submit an expense claim report, click anywhere on the text to access a blank form


NOTE: Displayed results may include other report types listed in addition to the expense claim report. The Expense & Progress Reporting section is also used for:

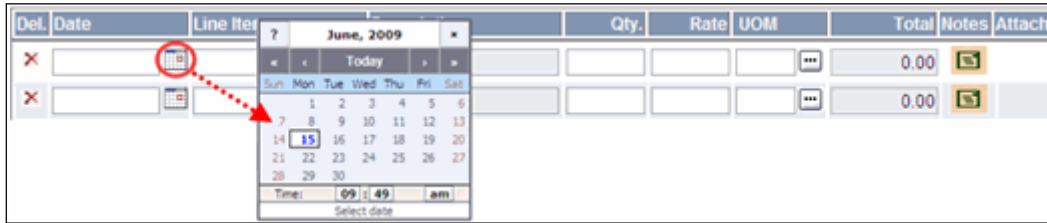
- submitting your annual progress/final report
- submitting expense claim reports
- submitting financial statements



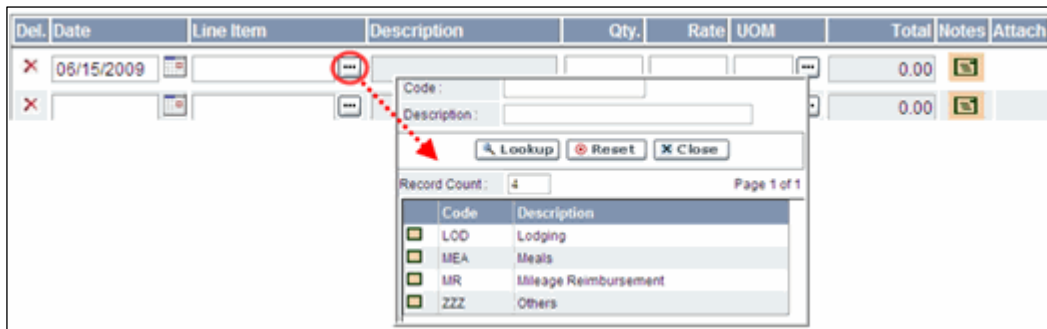
Completing the report

For each line item:

1. Click the  button in the **Date** column and indicate the date the expense was incurred:




2. Click the  button next to the **Line item** field and choose **Other**



3. Complete each line item according to the following guidelines:

Line item	Description	Qty (quantity)	Rate	UOM (unit of measure)
Other	Enter a brief description of the expense	Enter "1"	Enter the dollar value of the item including taxes.	Select Unit of Measure

4. The **Total** field will be automatically calculated based on the figures entered in the **Qty** and **Rate** fields. Note: **Permanent Equipment** claims should match the invoice from the **institution to CCS**.
5. If you have any explanatory notes, you can include them by clicking the  button and typing them into the **Justification Notes** window:



Del.	Date	Line Item	Description	Qty.	Rate	UOM	Total	Notes	Attach
X	07/13/2009	Mileage Reimbur...		300.00	0.350	KM	105.00		
X							0.00		

Justification Notes

Help Text:

Trip to Toronto to attend research symposium and present paper.

OK Close

- Return to the **Expenses & Progress Reporting** screen by clicking the **Close** button:

Expense Claim Timeout Left: 56 mins Date: Jun-15-09

Program: Research Fellowship - 2009 Agency: McMaster University Documents **Close**

Period: 06/08/2009 2009 Status: Work in Prog Review Comments:

Category: RAL Research Allowance Submit Date: 6/8/2009

Approved: 4,500.00 Expense YTD: 1,033.70 Balance: 3,468.30

- On the **Expenses & Progress Reporting** screen, mark the **Submit** checkbox and click **OK** to complete the process:

Expenses & Progress Reporting Timeout Left: 57 mins Date: Oct-13-09

Progress Report Budget

Specify Program Information and click find.

*Grant Program: RG-10 Research Grants - 2010 *Applicant: JTest Joe Test

*Institution: 000026 University of Toronto Display: Project Report

Project: Report: EXP Expense Claim

*Status: Pending Submitted Approved Cancelled Pending Correction Request All

Code	Grant Program	Project	Title	+Info
FLW-09	Research Fellowship - 2009	FLW-09	Over fellowship application	

Code	Description	Report Type	Notes	Report Freq.	Report Dt.	Grace Days	Submit Dt.	Review Notes	Status	Submit
EXP	Expense Claim	Expenditure	N/A	06/08/2009	30			WIP	<input checked="" type="checkbox"/>	

Indicates "Work In Progress" i.e. not yet submitted

Click Submit checkbox and then OK


Find OK Cancel

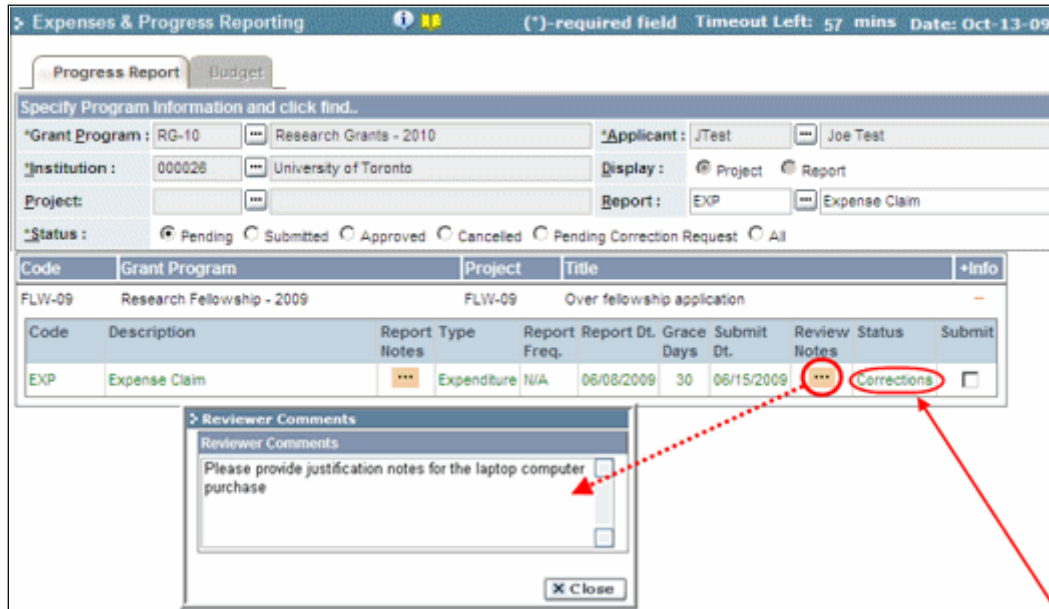
NOTE: You will not be able to create a new expense claim until your current claim has been approved. Once the claim is approved, the blank Expense Claim report will once again be listed with a status of "Pending" on the **Expenses & Progress Reporting** screen.



Corrections

If you submit a report that is incomplete or requires clarification, you will be notified via an automated e-mail and asked to re-submit the report.

1. Follow [steps 1-3 on page 1](#) to locate your expense claim report.
2. Click the  button marked **Review Notes** for any report with a status of **Corrections** to view the feedback requesting corrections:



Expenses & Progress Reporting (*)-required field Timeout Left: 57 mins Date: Oct-13-09

Progress Report Budgets

Specify Program Information and click find.

*Grant Program : RG-10 Research Grants - 2010 *Applicant : JTest Joe Test

*Institution : 000028 University of Toronto Display : Project Report

Project: Report: EXP Expense Claim

*Status : Pending Submitted Approved Cancelled Pending Correction Request All


Code	Grant Program	Project	Title	+Info						
FLW-09	Research Fellowship - 2009	FLW-09	Over fellowship application	-						
Code	Description	Report Type	Report Freq.	Report Dt.	Grace Days	Submit Dt.	Review Status	Notes	Submit	
EXP	Expense Claim	...	Expenditure	N/A	06/08/2009	30	06/15/2009	...	Corrections	<input type="checkbox"/>

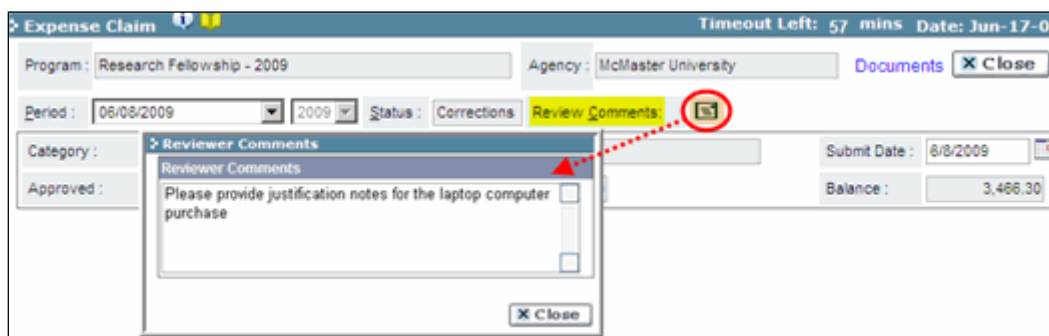
Reviewer Comments

Reviewer Comments

Please provide justification notes for the laptop computer purchase


X Close

3. Access the report by clicking anywhere on the text of the expense claim item.
4. Make the necessary corrections as per the review comments.
 - You can access the review comments from within the report by clicking the  button next to **Review Comments**.



Expense Claim Timeout Left: 57 mins Date: Jun-17-09

Program : Research Fellowship - 2009 Agency : McMaster University Documents X Close

Period : 06/08/2009 2009 Status : Corrections Review Comments 

Category : Reviewer Comments

Approved : Reviewer Comments

Please provide justification notes for the laptop computer purchase

Submit Date : 6/8/2009

Balance : 3,466.30

X Close



5. Click **Save**.
6. Click **Close** to return to the **Enter Expense/Progress Report** screen.
7. Click the **Submit** checkbox button and click **OK**.



APPENDIX: Canadian Cancer Society Research Training Award - Training expense policy highlights

Only expenditures related to training may be purchased or expensed using the training budget (such as conference fees, workshop registrations, equipment that will directly be used for training, travel or accommodation to attend training or learning). The training budget can also be used to support mentorship with mentors outside of academia (community, patients, caregivers, business leaders, etc.), including remuneration for mentors. Family members, where appropriate, may be considered – for instance, where a band Elder is sought for mentorship and may also be related to the applicant, the mentoring relationship can still be pursued. If unsure, please contact CCS. Tuition for the main program of study, equipment or supplies for ongoing research are ineligible expenses. The training budget is to be managed by the successful applicant, while complying with any institutional policies (i.e., that may require supervisor sign-off or other restrictions).

With the exception of claims for mileage, original itemized receipts are required, payment receipts are not eligible.

Training and Learning expenses are limited to:

Airfare: The lowest return economy airfare reasonably available under the circumstances. The cost of stopovers en-route will not be reimbursed, unless such stopovers are related to the award. Individuals will not be compensated for the use of airline tickets obtained from airline points, or from any other source where there is no out of pocket cost to the delegate. Seat selection will not be reimbursed. Baggage fees for one piece of luggage will be reimbursed.

Rail fare: First class return rail fare.

Automobiles: The rate per kilometre is **\$0.55/km** for the use of a private automobile when public transportation is not convenient, or if there is a net saving to the CCS as compared with the lowest airfare to and from the destination reasonably available under the circumstances.

Hotels: Standard hotel accommodations will be reimbursed, no upgraded rooms are permitted. Airbnb (or equivalent) is permitted and will be reimbursed where the cost is lower than or equal to an appropriate hotel or other accommodation.

Conference or training fees: Original receipts for conference or training must be included.

Note: receipts not in Canadian Dollars must be accompanied by a credit card statement showing the exchange rate (with personal details removed). Otherwise, the CCS exchange rate on the day of the purchase will apply.



Canadian
Cancer
Society

Expense claim forms must be completed within the duration of the award and cannot be claimed after the award end date.