Canadian Cancer Society

Tipsheet for grantees: submitting an expense claim in EGrAMS for:

1. **Letter of Intent development costs**
2. **Research Training Awards training expenses**
3. **Permanent Equipment**

1. **Letter of Intent development costs:** awarded letter of intent (LOI) applicants can submit expenses listed in the budget section of their LOI application. This includes patient partner remuneration, project manager/coordinator time, travel, and other well-justified expenses. The amount approved in EGrAMS and in the Notice of Award are the maximum amount allowable. Expenses must be incurred during the term indicated. Exceptions must be pre-approved by CCS staff.

   Details regarding LOI expense eligibility are listed in the letter of intent application guide for each grant competition and on the CCS grant webpage.

   NOTE: Reimbursements can be directed to different individuals and institutions by PDF printing the claim form in the expense claim section of EGrAMS and adding the correct name and address to the form prior to uploading in EGrAMS. It is recommended to submit multiple invoices being paid to the same person or institution in one expense claim, when feasible.

2. **Research Training Awards Training Budget:** refer to the amount approved in EGrAMS and in the Notice of Award. This is the maximum amount allowable for reimbursement. Expenses must be incurred during the term indicated.

   Ensure you group receipts by day and contact CCS research staff directly if you require a missing receipt affidavit. Eligible expenses cannot exceed the amount listed on the Notice of Award. All conference expenses must include the conference attendance confirmation. All training course reimbursements must include the certificate of completion.

   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.

   If the training expense has been paid by your institution and reimbursement should go to them, both the supplier invoice AND the invoice from the institution to CCS must be submitted (noting any tax reimbursements).

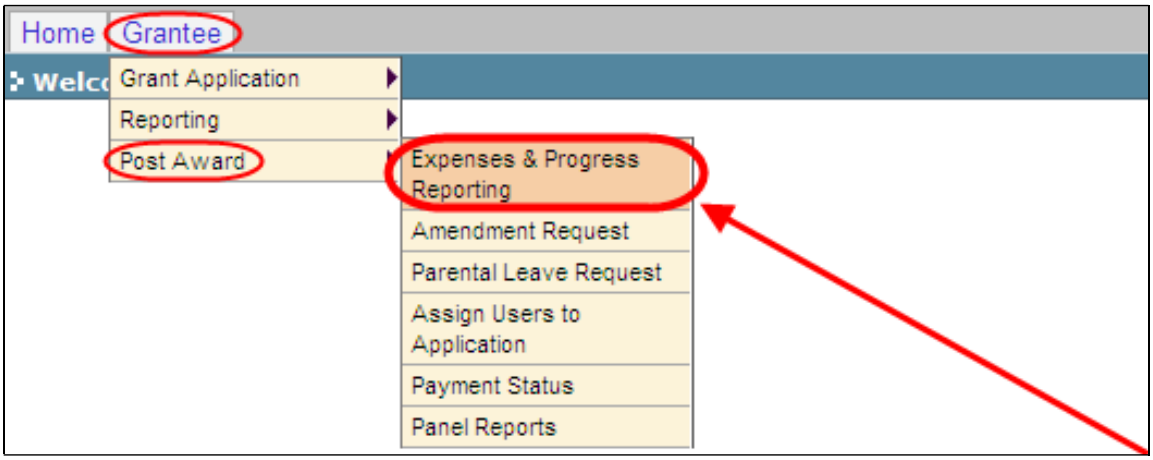
   Research Training Awards training eligible expenses are noted in more detail in the appendix, here.

3. **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.

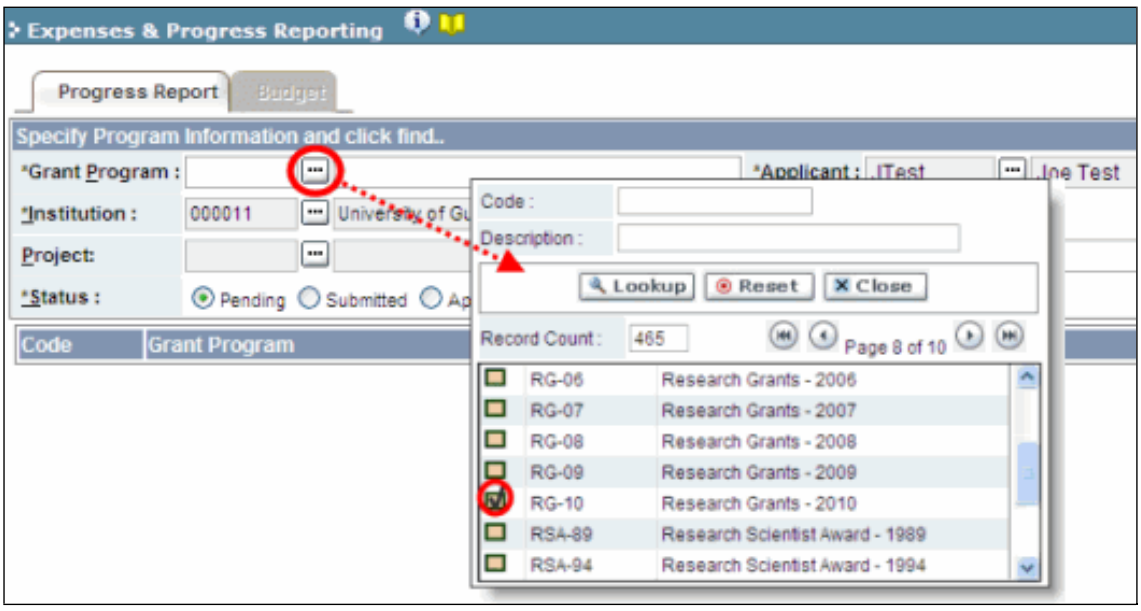
   Details regarding training and permanent equipment reimbursement are on the CCS Financial Administration webpage.

Opening the report

1. Go to the **EGrAMS home page** and log in.
2. Go to **Expenses & Progress Reporting** in the menu:

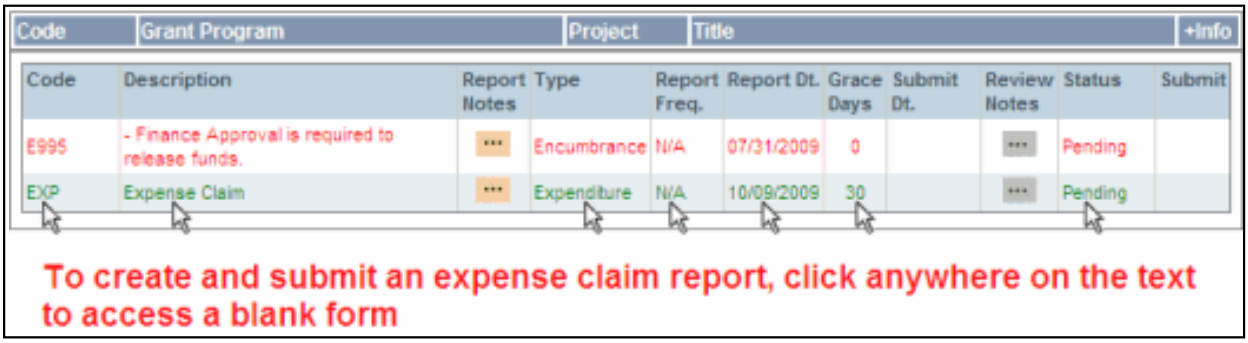


3. Set the criteria for **Grant Program** by clicking the button and choosing the appropriate program from the lookup box:



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:

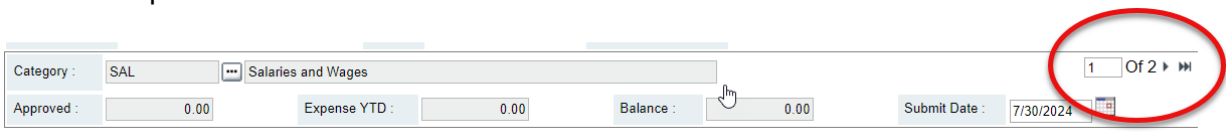


NOTE: Displayed results may include other report types listed in addition to the expense claim report. The Expense & Progress Reporting section is also used for:

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

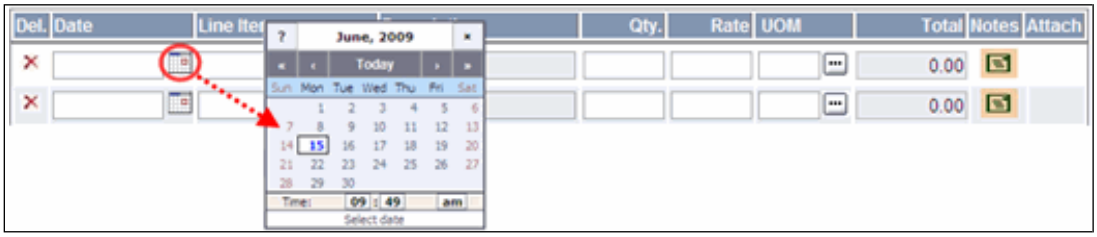
Completing the report

Note: Letter of Intent expense claims may need to select the appropriate page from the 'Expendables / Supplies' or 'Salaries & benefits' section, using the page arrows in the EGrAMS expense claim.

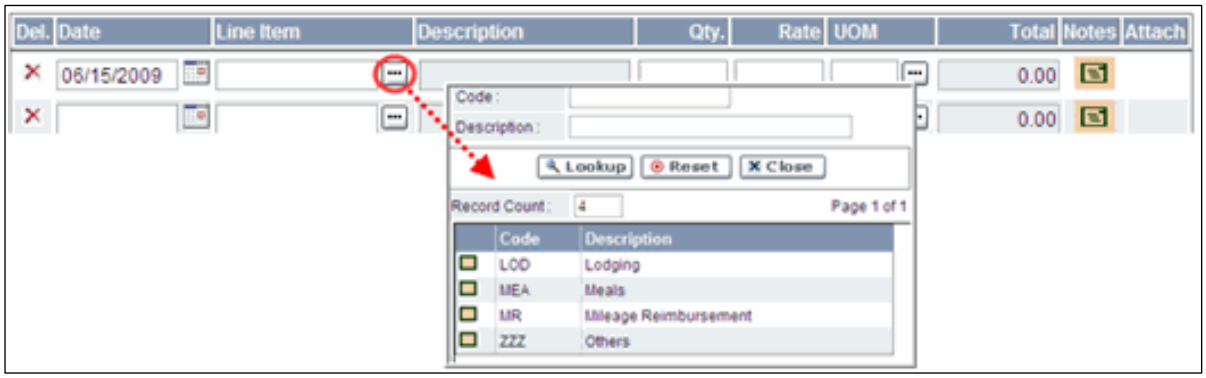


For each line item:

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**

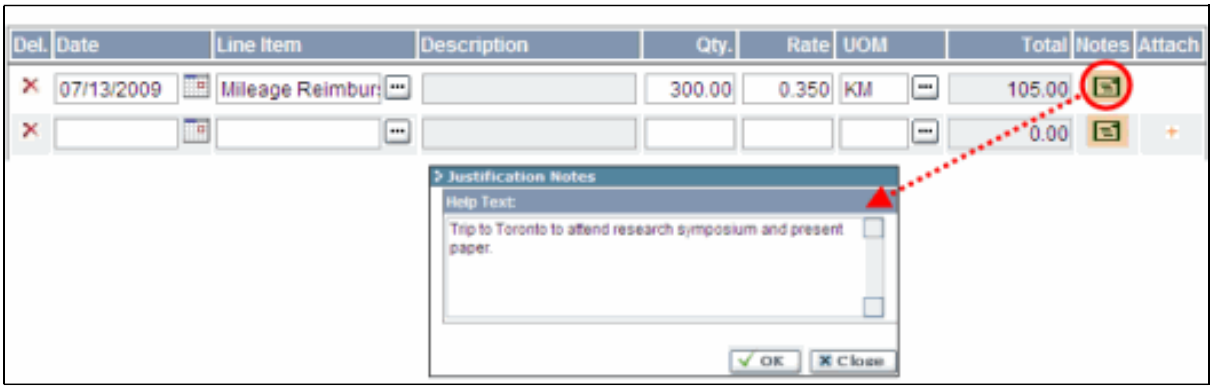


3. Complete each line item according to the following guidelines:

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:

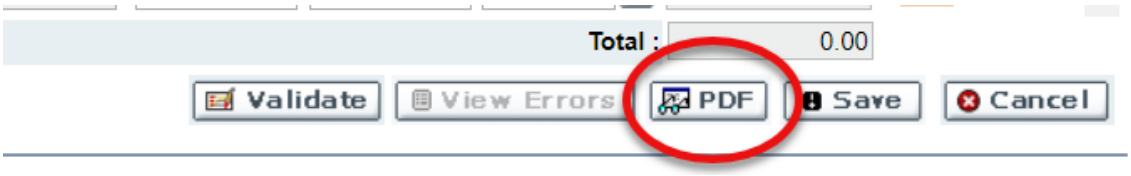


6. Add the invoices, receipts, credit card statement with exchange rate details (personal details removed) and/or affidavit by clicking the **+** in the **Attach** section

and uploading the files.

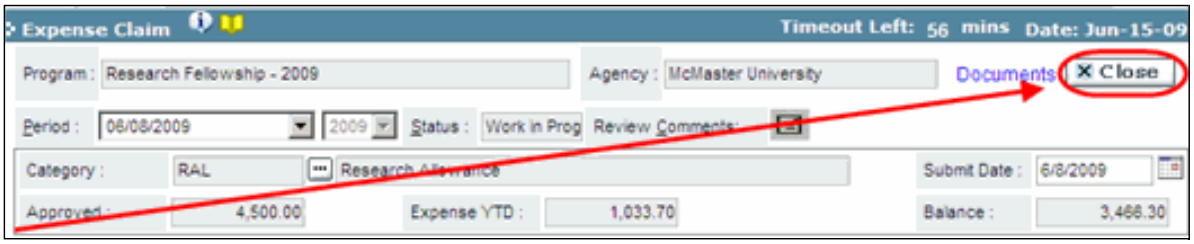
- Expenses that were paid by the individual, that should be sent to the individual instead of the institution, will require a signed claim form with personal payment details added (name, mailing address, and phone number), then be uploaded in the **Attach** section.

Print to PDF the claim form and edit details before uploading in the attachment section:

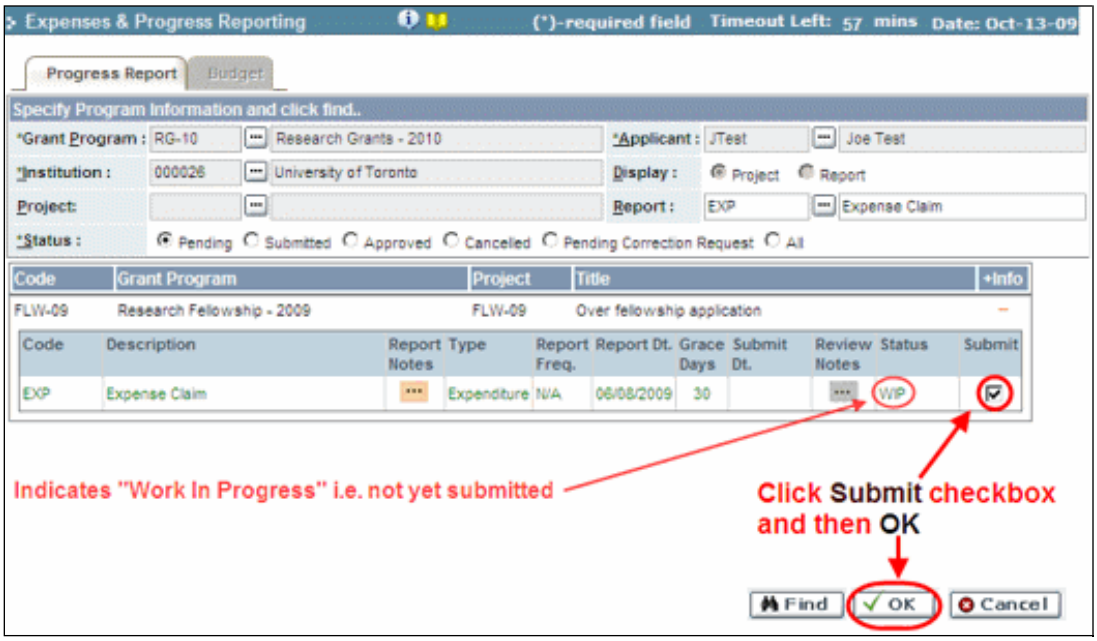


7. After all details and attachments are entered, press **Save** and **Validate** to make sure no errors pop-up.

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



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



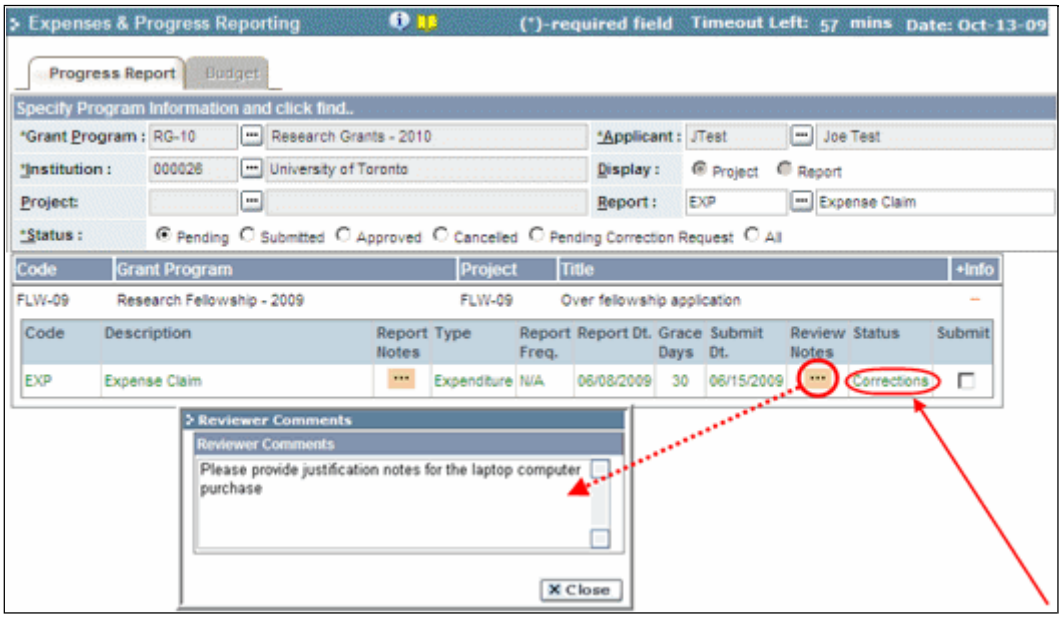
NOTE: You will not be able to create a new expense claim until your current claim has been approved. Once the claim is approved, the blank Expense Claim report will once again be listed with a status of "Pending" on the **Expenses & Progress Reporting** screen.

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.

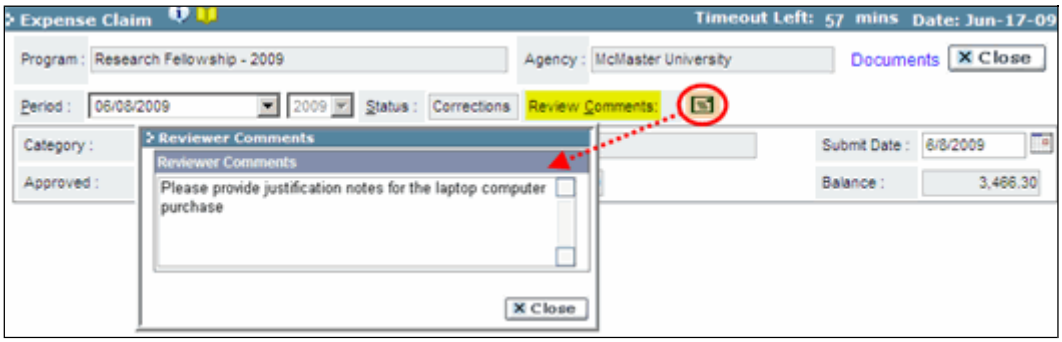
1. Follow steps 1-3 on page 1 to locate your expense claim report.

2. Click the ··· button marked **Review Notes** for any report with a status of **Corrections** to view the feedback requesting corrections:



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**.



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

Canadian Cancer Society

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) listed on the Notice of Award. Conference expenses are eligible for reimbursement up to 50% of the awarded training amount. 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 at research@cancer.ca.

Any expenses that relate to the responsibilities of the host laboratory or institution are ineligible. This includes but is not limited to equipment or supplies for ongoing research. Tuition for the main program of study is not eligible. 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. Contact research@cancer.ca if you have lost your itemized receipt and need to complete an affidavit.

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 stop-overs 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 **$0.60/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. For mileage claims in excess of 200km per trip, Google Maps screen shot showing the route taken must be submitted.

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: confirmation of attendance must be included for conferences andcertificate of completion must be included in your submission for training.

Meals: not an eligible expense

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.

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