

Temporary Electronic Financial Procedures-Zoology

As we transition to working from home for the next while, the AP/ reimbursement process is being altered temporarily to accommodate those changes. Please follow the process as outlined below.

- 1) Complete the highlighted sections on the Treq/Qreq form from the Zoology website:

<https://www.zoology.ubc.ca/resources/finance/finance-forms>

Add your electronic signature in the required field. If you are not able to do so, write the following in the e-mail body when submitting the claim:

"I hereby certify that the expenses in this requisition for payment in the amount of (enter the total claim amount) comply with UBC policy #83 (Travel Policy) and the sponsor or donor terms and conditions where applicable".

Please note this requirement is only applicable for travel claims.

- 2) Scan the original itemized receipts and adhere to these guidelines:
 - a) One file/scan per receipt
 - b) Save each file using this convention:
"Vendor Name Your Last Name" (example for Air Canada ticket: "Air Canada Smith")
 - c) If you are unable to scan the original receipt, take a photo instead. Convert the photos to PDF
<https://www.wikihow.com/Convert-JPG-to-PDF>
 - d) E-mailed receipts are acceptable, but they must provide detailed description of items purchased

- 3) a) **For students and staff:** e-mail completed & signed Treq/Qreq form and the electronic receipts to your supervisor for their approval and the speed chart from which they wish to pay. Send the e-mail from your zoology e-mail address and make sure to add your e-mail signature with your full name and your UBC position/affiliation.

The supervisor should then forward this e-mail with their approval to **Anashuya or Jackie**.

The following information has to be clearly stated by the approver in their email:

- State "OK to pay"
- Payee name _____
- Total Transaction Amount (incl taxes) _____
- Speed chart _____

b) **For faculty:** e-mail completed & signed Treq/Qreq form with the electronic receipts directly to Jackie or Anashuya for review and processing. Send the e-mail from your zoology e-mail address and make sure to add your e-mail signature with your full name and your UBC position.

c) **For submitting on behalf of NON-UBC individuals**, please reach out for Jackie and Anashuya for guidance.

- 4) Anashuya or Jackie will e-mail the claimant acknowledging the receipt of the claim and will follow up if any info is missing.
- 5) **Keep your original receipts.** When we return to normal operations, we will request that you bring the original receipts to our office. At that time, we might ask you to provide your original signature.

For all other financial requests and enquires please follow the existing procedure.

We will let you know if we need to make updates to this process.

Contact for PI last names starting with A-M

[Anashuya Kakati](#)
finance@zoology.ubc.ca
604-822-4265

Contact for PI last names starting with N-Z

[Jackie Carpio](#)
finclerk@zoology.ubc.ca
604-822-0871

Olga Tosin contact info: tosin@zoology.ubc.ca, 604-822-6895