Submitting an Expense Report
Guide for the Claimant

This slide deck will provide you with guidance, including screen shots, on how to submit your Expense Report. As at May 27th over 46% of Expense Reports created in the system we awaiting the claimant’s submission before the claimant can be paid or before the payment goes to his or her Diners account.

If you are a Claimant who has delegated your Expense Report creation to a Delegate, then you still have a role to do, you need to review your report for accuracy and compliance to AP-01, then you need to budget check and approve (which submits your Expense Report for supervisor/purpose approver approval and payment).

This process, once you are accustomed to it takes 1-2 minutes.
The Tip Sheet is right on the sign-in page at:
mosaic.mcmaster.ca

Direct Claimants here
Tip Sheet for Claimant Submission

This is the way to find anything an individual has awaiting approval.
Try It: Claimant Submission

Now that you have seen the tip sheet, give it a try:

**Step 1:** Click “Sign In”

The next screen will appear looking like this:

**Step 2:** Enter your standard Mac ID & password, then click “Sign In”
Try It: Claimant Submission

Now that you have seen the tip sheet, give it a try:

**Step 3:** Click the “My Work” tab that appears now that you signed in.

The next screen to appear is the “My Work” home page, any financial transactions awaiting your approval will appear under the “Finance Work List”.

**Step 4:** Click “Finance Work List”
At this point **anything** that is awaiting your approval or submission will appear.

Expense Reports awaiting your approval (or submission) are shown as an:

**ER#####**

From the list.

**Step 5:** Click the ER#####, this will take you to the details of the expense report to review and submit.

It looks like this.
Try It: Claimant Submission

Now you will see your Expense Report appear. Because I had a delegate prepare my report my role is to look it over, ensure its accurate, compliant with AP-01. I can look at the attachments and when I am satisfied then need to (1) do a budget check, then (2) Approve (which submits it for further supervisor/purpose approver approval and payment.

Step 6: click “Budget Options” to do the budget checking.
Try It: Claimant Submission

At this point the screen I was on becomes greyed out and a “Commitment Control” box comes up to check my expense against the budget.

**Step 7:** click “Budget Check” at this stage your expense if being checked against budget and the Commitment Control box will update to see that the expense is valid.

**Step 8:** if valid, click “OK” to be returned to your original report and do the final approve step, which submits your expense report!
Try It: Claimant Submission

Now that you have completed the budget check, the Budget Status indicates “Valid” and the “Approve” button is now coloured meaning you are able to “Approve”

**Step 9:** click “Approve”

Once you approve you have one last confirmation will pop up, here clicking “OK” will result in the submission to your supervisor/purpose approve to approve and pay.

**Step 10:** click “OK” once this is clicked you will see the approve button is no longer an option.
Try It: Claimant Submission

At this point you can go back to your:

“Finance Work List”, if you have other items awaiting your approval.

Or, sign out.

Here I have chosen to go back to my work list. At this point I can see my Expense Report no longer appears on my work list.