

## **Workflow Overview for:**

- **Visitors/PostDocs appointments**
- **financial requisitions (refund claims)**

The purpose of this document is to give an indication of some of the unseen complexity that goes into processing visitor requests and financial requisitions.

### **Visitors - PostDocs**

1. Process necessary paperwork (i.e. copy of Letter of Invitation, Offer Letter, Appointment Form, CV, etc.)

#### **Once all paperwork have been completed:**

1. host or hosts need to sign the offer letter and appointment form
2. offer letter then has to be signed by the visitor or PostDoc
3. the complete file is passed on to HR Management Sharon Craddock; she checks if all information is correct, initials faculty appointment form after she's reviewed it
4. file then goes to Michelle Lin (Finance); she checks speed chart/s, if hosts can afford the visitor or Postdoc and don't have any future expenses
5. Sandra Redekop initials the appointment form too
6. file will be forwarded to the Head for signature
7. file will be returned to the GA.
8. GA makes necessary copies and mails out original & copies to the Dean's Office for signature
9. paperwork is forwarded to Faculty Relations for approval
10. for paid visitors & Postdoc appointments, paperwork is passed on to Payroll

### **Financial Requisitions:**

Once the claim is complete, GA starts processing the claim (in chronological order):

- regular straight forward claim – should take about 5 to 10 minutes
- travel claims – depending on the length of travel could take up to 30 minutes or even 1 day or longer; it all depends on if GA has additional questions and how fast faculty member respond to GA's email request

#### **Once everything has been entered into Smart Forms:**

1. Grant holder signs the claim
2. If it's a travel claim, traveler signs first
3. Depending who the payee is, either then grant holder signs off claim or the department head
4. GA makes copies and forwards copy and original to Finance clerk Michelle Lin
5. Michelle checks claims and forwards them to Sandra who does the final check
6. Michelle passes those requisitions that need the department head's signature to head secretary
7. Once claim has all required signatures, Michelle then forwards them to UBC Finance.

It is known that UBC Finance is backlogged. It may take 4 weeks to 2 months to get reimbursed.