

Tips for Travel Advances and Claims – revised 2013-08-28

If you can keep these things in mind BEFORE applying for funding and BEFORE traveling, it will save a lot of problems when processing the advances and claims. **You must apply for advances before the trip – and submit all receipts to Debbie after you return in order to be reimbursed.**

1. When submitting requests for travel funding to our office, please complete and submit the Request to use PDA Funds form via email to your supervisor with a copy to busphd@ualberta.ca, and ask your supervisor to confirm his/her approval of use of the funds. The form is available in the PhD Public folder on the I Drive. You can indicate that you would like to receive a cash advance to pre-pay airfare and registration only.
2. Upon return from your trip, please bring all of your receipts to our office, even if you are also receiving funding from one or more other sources. **Please make sure that all receipts clearly indicate what the expense was for. This includes receipts for immigration applications, etc.**
3. If you have received a travel award from FGSR, the GSA, or from a conference, you will need to provide documentation to us showing your expenses including the award. You only have to account for the award to the awarding agency if they ask for it. If you have received a travel advance and then a travel award, you will be required to refund the PhD program if your total expenses are less than the combination of the award and the advance.
4. If your department or faculty member is providing funding, please provide documentation indicating this and the amount of the funding. An email from your supervisor or department chair sent to busphd@ualberta.ca is sufficient.
5. It would be helpful to have an itemized list of all your expenses.
6. If you have a credit card bill showing foreign currency conversion, please provide it to receive reimbursement for the exact amount you were charged. Without that documentation, the financial system will calculate currency exchange automatically. We do not require credit card bills for proof of payment in Canadian dollars unless your receipt does not verify that payment has been received.
7. Please save your boarding passes and include them with your claim receipts. Even one is better than none. We also need to have the receipt from the travel agent or the on-line flight booking receipt, preferably with GST included on the fare breakdown.
8. It is important to have the actual itemized hotel bill. Accounting will not accept only a credit card receipt or bill for reimbursement.
9. Include your conference registration receipt even if you are not claiming it as an expense. **You must also include at least a copy of the front page of the conference program.**
10. If you are using a per diem rate for food rather than receipts for meals, please remember to indicate any meals that were provided by the conference or were paid for by someone else.
11. If you are claiming mileage, you cannot also claim for gas.
12. You will need to authorize Debbie Giesbrecht to be a “designated entry authority” in the financial software prior to your first claim. Debbie will walk you through the process which takes about 2 minutes, when you bring your claim receipts into the PhD office.
13. All expenses will be carefully scrutinized to ensure that the actual expenditure is appropriate.
14. We will not reimburse for internet connection at hotels. Most hotels have business centres, so it should not be necessary to use the expensive connection in the hotel room.
15. We will not reimburse for taxis to and from airports unless it is shared with one or more others, or it can be justified. Most cities/airports have shuttles, trains or some other form of public transit which are much more cost effective.
16. **Please submit all receipts as soon as possible after returning.**

Your efforts in providing accurate information are appreciated. If you have any questions about travel advances or claims, please stop by the office and Debbie will answer them for you. You may also consult <https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Travel-Expense-Procedure.pdf>

August 28, 2013