Travel and expense claims must be submitted within 30 days of the expense. Expenses incurred near the end of a fiscal year (i.e. January through March) may only be claimed up to 45 days into the new fiscal year or they become non-reimbursable. This tip sheet represents a summary only of the requirements for charging travel expenditures to the University. Please see detailed UAPPOL Travel Expense Procedure and corresponding Appendix A - Schedule of Allowable Expenses. Travel tools and TAP / HAP information is located at the SMS Travel Management website.

All claims must be reasonable and reflect prudence, good judgment, due diligence to reasonable economy and be defensible to a reasonable and impartial observer. For approved University business travel, the traveler will be reimbursed for appropriately receipted, legitimate and reasonable expenses at the approver’s discretion. Donor/sponsor/agency restrictions apply and in the absence of donor/sponsor/agency conditions, University policies and procedures apply.

Original Receipts and Proof of Payment

Original itemized vendor receipts must accompany a travel and expense claim (a credit card or debit card slip is not considered an original receipt).

Purchase of Goods and Services (Non-Travel Related)

Limit does not apply to P.E.R Reimbursements
Expense claims will be processed to a maximum of $1,000/receipt for out-of-pocket expenses. Contact your administrator BEFORE PURCHASE IS MADE for purchase options exceeding $1,000/receipt.

Air Fare & Boarding Passes “FoMD Policy Differs from UAPPOL
FOMD will continue to reimburse lowest available cost tickets (generally Tango or similar class) for flights less than 4 hours*. Any upgraded travel will require written pre-approval from the Dean.

Flex Class or similar class tickets will only be reimbursed only under the following circumstances:
• Travel in excess of four hours (i.e. Edmonton to Toronto) with evidence of a speaking or similar engagement on the day of arrival (supporting document required) *
Air fare for flights outside of Canada and the USA that exceed the lowest available economy (such as Latitude, business, executive or first class) require written PRE-APPROVAL from the traveler’s Dean or Vice-President; and may only be charged to the University in the following circumstances:
• A medical condition necessitates an upgraded travel class.
• A business reason can be demonstrated.
• Travel is outside of Canada and the USA (excluding Hawaii).

Claim to include original airline ticket receipt detailing the fees and taxes paid, flight itinerary and proof of purchase. If the traveler chooses to personally pay for upgraded airfare, a screen print of the lowest available airfare at time of booking must be attached to the claim. Boarding passes are required for project-related speed codes as specified by the funder. Boarding passes are not required when other supporting travel documentation such as vendor receipts for hotel, taxi fares or a certificate of conference attendance are attached. If restricted funding is used, sponsor/agency conditions apply. Preferred method of payment: Travel Authorization Payment (TAP).

Conference Registration

Receipt for registration and evidence of the conference you attended as well as the conference itinerary.

Ground Transportation

All ground transportation, to and from airport, hotel locations, etc. require original receipts. Buses, trains and toll fees can be claimed as Ground Transportation. Mileage rate has increased to $0.50/km. A personal vehicle can only be used for travel to a maximum of 800 km (round trip).

Accommodation

Reimbursement is limited to the single occupancy rate for standard accommodation, or the lowest economy rate available, whichever is the least expensive. For conferences, the host hotel is preferred for safety reasons and to avoid additional costs such as taxis. Accommodation claims should be itemized separately from other eligible hotel charges, etc. Preferred method of payment: Hotel Authorization Payment (HAP).

Hosting (only permitted when hosting someone external to the university i.e. donors, recruits, visiting speakers)
Hosting requires an original itemized receipt including date, purpose of event and names of persons hosted with no exceptions. Lost receipt forms are no longer accepted for hosting claims. Reimbursement for working sessions is limited to workshops, retreats and committee meetings. Expenses related to staff meeting over the lunch or dinner hour is not reimbursable as per the UAPPOL Hospitality Policy

Tips

A rate of 15% is adopted by the University in all cases where the individual is making the decision.

Gift Cards

Gift card for participation in a research study can no longer be claimed through an expense claim as noted on page 8 of the SMS Guidelines for Payments

NEW Policy Changes

Receipts not required for:
• Meal allowance
• Incidental allowance
• Kilometer allowance

Travel Meals:
Meal Allowance rates are mandated. Maximum meal allowance rates are:
- Within Canada or USA
  - $60 CAD or $60 USD per day:
    • $15 Breakfast
    • $15 Lunch
    • $30 Dinner
  - Outside Canada or USA
    - $85 CAD per day:
      • $20 Breakfast
      • $20 Lunch
      • $45 Dinner

Meals for partial days are adjusted based on:
- Departure time from home prior to:
  - Breakfast: 7:30 am
  - Lunch: 1:00 pm
  - Dinner: 6:30 pm
- Return time to residence later than:
  - Breakfast: 7:30 am
  - Lunch: 1:00 pm
  - Dinner: 6:30 pm

Meals provided at no additional cost (such as with conference registration or accommodations) will not be reimbursed unless a dietary restriction or business reason is provided.

Incidental Allowance:
Maximum $10 CAD for each night traveler is away on University business.

Private Automobile:
- Kilometer allowance $0.50 per km for use of a private vehicle; reimbursed only for travel up to maximum 800 kilometers round-trip.
  - Rough road supplement of $0.04 per kilometer (support required).
  - After 11, 625 km per calendar year is claimed, the rate changes to $0.31 per km.

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