TRAVEL & EXPENSE CLAIM TIP SHEET

Travel and expense claims must be submitted within 30 days of the expense. Expenses that were incurred in the previous fiscal year may only be claimed up to 45 days into the new fiscal year or they become non-reimbursable. Please refer to the University of Alberta’s policies and procedures for more details [https://policiesonline.ualberta.ca/PoliciesProcedures/Pages/Finance.aspx](https://policiesonline.ualberta.ca/PoliciesProcedures/Pages/Finance.aspx).

All claims must be reasonable and reflect prudence, good judgment, due diligence to reasonable economy and be defensible to a reasonable and impartial observer. Only the cost of the most economical travel will be reimbursed. The following requirements outline the documentation that must be submitted with a travel and expense claim and FOMD policy on reimbursable airfare.

Air Fare & Boarding Passes
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) hours with evidence of a speaking or similar engagement on the day of arrival (supporting document required).
- A Tango or similar class fare is not available.
- Any upgraded travel will require written pre-approval from the Dean (see below).

Latitude Class or similar class or lowest cost business class ticket will only be reimbursed with written PRE-APPROVAL from the Dean and only under the following circumstances:
- Medical condition necessitates an upgrade or a business reason can be demonstrated; or
- Travel OUTSIDE of Canada and the USA (excluding Hawaii); and
- Confirmation by one-over-one or department chair of source of funding and funding source is not restricted for this use.

Claim to include airline ticket with breakdown of the fees and taxes paid or, if a fare upgrade is paid personally, a screen print substantiating the Tango/Flex or equivalent fare at time of booking plus Dean email/letter approval. Boarding passes are required for all project-related speed codes. Boarding passes are not required for operating speed codes if other supporting travel documentation is submitted with the claim, i.e. receipt from destination. 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).

Original Receipts and Proof of Payment
Original itemized receipts from the vendor must be submitted for reimbursement of claims other than meal per diems. You may be asked to provide proof of payment for some expenses, such as a redacted credit card statement. A credit card chit is not an itemized receipt.

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.

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.

Purchase of Goods and Services (Non-Travel Related)
Expense claims will be processed to a maximum of $1,000/receipt for out-of-pocket expenses. Contact your administrator for purchase options exceeding $1,000/receipt.

NEW-Policy Changes

Meal Reimbursement:
Allowance Rate use is mandated for meals except for special pre-approved instances. Allowance claims do not require receipts.

Allowance Rates:
Within North America: $60CAD/USD per day, adjusted to partial day travel as follows:
- $15 Breakfast
- $15 Lunch
- $30 Dinner

Outside North America: $85CAD per day, adjusted for partial day travel as follows:
- $20 Breakfast
- $20 Lunch
- $45 Dinner

When can a partial allowance be claimed on the day of travel?
Breakfast: if departure from home is 7:30 am or earlier or arrival home is 7:30 am or earlier.
Lunch: if departure from home is 1 pm or earlier or arrival home is 1 pm or earlier.
Dinner: if departure from home is 6:30 pm or earlier or return home is 6:30 pm or earlier.

When not claimed?
Not claimed when meals are provided at no cost (i.e. included in conference registration or hotel rate) unless dietary restriction or business reason provided.

Incidental Allowance:
- Max. of $10CAD per day
- Overnight stays only
- No receipts required

Travel Advances:
Typically not available due to other available payments options, i.e. TAP, HAP, purchasing card (conference fees).