

**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 details 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 judgement, 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). Unsupported expenses will not be reimbursed.

### Purchase of Goods and Services (Non-Travel Related)

#### **Limit does not apply to P.E.R. Reimbursements or hospitality events**

Expense claims will be processed to a **maximum of \$500/receipt for out-of-pocket expenses**. Contact your administrator **BEFORE PURCHASE IS MADE** for purchase options exceeding \$500/receipt excluding hospitality.  
Corporate P-Card Application

### Travel Advances

Typically, not available due to access to other payment options (TAP, HAP, purchasing card (i.e., conference registration), University travel card).

### Air Fare & Boarding Passes

**Chemistry will continue to reimburse lowest available cost tickets (generally Economy Basic/Standard, Econo and Econo Flex). Any upgraded travel will require written pre-approval from the Dean. TAP form must be listed on the claim and marked non-reimbursable. SAP Concur system must be used in order to be reimbursed.**

*Preferred method of payment: Travel Authorization Payment (TAP). Payment can be made using a personal credit card if additional personal travel will be included in the itinerary or if expense will not be reimbursed (i.e., student award, etc.)*

### [SAP Concur Login](#)

### [Traveller Profile Creation \(first-time users only\)](#)

### [Booking a Flight Tip Sheet](#)

Flex Class or similar class tickets will only be reimbursed under the following circumstances:

- Travel in excess of 4 hours (e.g. 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 Flex, 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)

### Travel Meals:

Meal Allowance rates are mandated. **Maximum meal allowance rates are:**

#### Within Canada or USA:

\$60 CAD 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/day (Newspapers, tipping, water, coffee, etc.)

### Private Automobile:

Kilometer allowance \$0.50/km

for use of a private vehicle;

**reimbursed only for travel up to maximum of 1000 km roundtrip.**

- Rough road supplement of \$0.04 per km (support required)
- After 11,625 km per calendar year is claimed, the rate changes to \$0.31 per km.

***Claimable Associated Air Fare Costs: Limited to ONE checked bag to and from travel location, Seat Selection fees, Flight cancellation insurance***

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 screenshot of the lowest available airfare at time of booking must be attached to the claim. 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.

**Conference Registration**

Conference registration is limited to the fees required for conference activities. Optional conference activities or other entertainment are ineligible expenses, however, if accommodations are included in the conference registration this is an eligible expense. Receipt for registration and evidence of the conference you attended as well as the conference itinerary is required. If purchase on corporate card it must be included on the claim and marked non-reimbursable. *Preferred Method of Payment: Corporate Purchasing Card*

**Ground Transportation/Car Rentals**

All ground transportation (buses, trains, taxis, and toll fees) to and from airport, hotel locations, etc. require original receipts. Rentals are limited to a compact, mid-size, full-size, or SUV depending on justifiable need. Cost to secure insurance that includes collision waiver, loss damage waiver, and third party liability insurance is allowed. *Preferred Method of Payment: Personal Credit Card*

**Accommodation**

Reimbursement is limited to the single occupancy rate for standard accommodation, or the lowest economy rate available. 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) if applicable, otherwise UofA issued Travel card (Diner's Card) or Personal Credit Card. [HAP form](#) must be listed on the claim and marked non-reimbursable.*

***Accommodation for one night before and after an event is acceptable; one additional day may be added prior to the business purpose to a maximum of 2 days if the travel is international.***

Associated Accommodation Costs: Hosted by Friends/Family- purchase of a gift as a modest gesture of appreciation is limited to \$20/day to a max of \$300 for entire stay (No Alcohol). Receipts required.

**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. Reimbursement for working sessions is limited to workshops, retreats and committee meetings. Expenses related to staff meeting over lunch or dinner hour is not reimbursable as per UAPPOL Hospitality Policy.

**Internet or Telephone Charges**

Limited to a portion of actual cost related to UofA business, receipt required.

**Cellular Phone Charges**

Personal cellular phone usage while travelling on business, itemized receipt required from cell phone provider. Must include all pages of the monthly statement and proof of payment. ***"Roaming charges" are fully reimbursable.***

**Tips**

A rate of 18% is adopted in hospitality situations and 15% for all ground transportation by the University in all cases where the individual is making the decision.

**Gift Cards (Not Allowed on Expense claims)**

Gift cards for research participants are not allowed on Expense claims. Refer to SMS Guidelines for Payments.

### **Ineligible Travel Expenses**

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- List, damaged, or stolen personal property belonging to the traveler (i.e., clothing, laptops, cell phones, cameras, electronic equipment, personal identification, luggage)
- All costs associated with missing a flight and the rescheduling of a new flight due to late arrival
- Expenses relating to an employee/contractor commuting between home and place of work
- Parking expenses at the claimant's primary work location
- Expenses related to in-town conferences, seminars and meetings (within 25 km radius)
- Value of redeemed reward points, personal air credits, and gift cards for the purpose of UofA travel and expenses
- Cost to secure and obtain a passport and/or Nexxus Card, airport lounge pass, Canada National park pass or roadside service membership
- Personal travel added to a business trip (Traveler is required to submit written proof of the cost of the trip without personal portion)
  - Airfare- additional fees to change flight times, travel dates and/or destinations for personal reasons (Traveler can only claim the return airfare from the original destination)
  - Accommodations- Additional fees to upgrade hotel room to accommodate personal reasons (i.e., family)
  - Vehicle rental- Additional fee to upgrade to a larger vehicle to accommodate personal needs.
- Tips in excess of 18% where the claimant is making the decision.
- Any expenses not listed on the [Appendix A- Schedule of Allowable Travel Expenses](#) are considered a non-reimbursable expense

### **Supporting Documentation required for all Travel Claims**

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- Purpose of the trip, including names of conferences, details of meetings, departure and return dates
- For research or special purpose project, the traveler's affiliation with the project
- A description for each expense line
- Any expenses related to the trip paid directly by the University, such as TAP/HAP/P-card are to be included on the claim and marked as non-reimbursable. Copies of receipts are required.
- **Original itemized receipts.** Unsupported expenses will not be reimbursed.
- Boarding pass if the following is not included: hotel receipts, taxi/Uber receipts to/from airport
- Start and end date of travel and travel location must be identified
- Itineraries for air and ground travel that provide details relating to the purpose of the trip
- Fare class booked must be displayed on the submitted itinerary
- Conference, meeting, and event agendas
- Google maps showing mileage claimed – can only claim mileage for which claimant is in the vehicle