

How to submit a travel expense claim

Refer to [instructions and guidelines to submit a travel expense claim through PeopleSoft Financials](#).

Tips for incurring/submitting a travel expense claim

Note: Expenses can only be claimed by the person who incurred those costs. Including the expenses of other staff members in your claim may result in your claim being returned or denied.

When booking airfare, accommodation and car rental:

- Always book your airfare through Maritime Travel.
- When submitting the travel claim, provide justification and attach receipts and quotes to support amounts claimed.

When personal travel is combined with business travel:

- Obtain quotes for airfare (business portion of your trip), accommodation (standard single occupancy room), and car rental (compact size vehicle).
- Pay with personal funds if personal travel is added or will be claimed as Professional Expense Allowance (PER).

Obtain pre-approval for the following situations and attach to your claim:

- Personal vehicle use over 1,000 km for round trip requires pre-approval from the **budget owner**.
- Upgraded hotel rooms require pre-approval from the **budget owner**.
- Airfare exceeding the lowest available fare (Business/First Class, Latitude and Premium Economy) requires pre-approval from the **Dean, Director, AVP and VP**.

Comply with UAPPOL when using research funding

- Ensure submitted expenses are within the budget of the research project and compliant with UAPPOL (See [Travel Processes & Expense Procedure](#) & [Appendix A: Schedule of Allowable Travel expenses](#)). Document all exceptions in the description of your claim and attach a budget/letter from the sponsor.
- Provide a summary of research activities broken down by date. The business reason for all expenses should be demonstrated.
- If the Principal Investigator/Supervisor is paying for students' accommodation, provide names of students who traveled to ensure that expenses are not duplicated.

Submit claims at least 6 weeks before the following circumstances:

- When employment contracts are ending, submit claims 6 weeks **before an employee's last day**.
- If a project is closing, submit claims for the project at least 6 weeks before **the project end date**.

Ensure you have supporting documentation

- PDFs are the preferred format for supporting documentation. Other file types may cause delays in processing your claim.
- Attach the following supporting documentation to your claim:
 - Conference / meeting agendas
 - Invitation letter from the hosting institution for collaboration

- Itemized (detailed) receipts (airfare, accommodation, registration fees, etc.)
- If no payment information is reflected on the invoice, attach a redacted copy of your credit card or bank statement.

Submit a separate travel claim for each trip

- All costs associated with a trip should be included in a single claim. Multiple trips cannot be processed and reimbursed on the same claim.

Describe your business/research activity

- University travel occurs for conferences, seminars, meetings, collaboration, research, and site visits (event). As outlined in the UAPPOL Travel Processes and Expense Procedure, all of these cases must be supported by the four “W’s” in the travel claim:
 - **What** was the business activity – (purpose of the event)
 - **Who** was in attendance at the event
 - **Where** did the event take place
 - **When** did the event occur – date(s) of event and travel dates

When documenting expense line items, follow these guidelines:

- **Exclude** expenses that are not related to business travel
- **Include** all non-reimbursable expenses
 - For expenses paid by University’s purchasing methods (e.g., TAP, HAP), check the non-reimbursable box on the claim, and attach receipt.
 - Travel expenses paid with PCard do not need to be included in the travel claim.
- **Per diem/meal allowance** should be included on one expense line with the date range noted in the description. Reduced (less than a full day) meal allowance rates can be used.
- **Registration fees** can only be reimbursed **after** the event occurred.
- **Gratuities** should never exceed 18% for any situation (i.e. taxi, hospitality, etc.)
- To help expedite your claim review, provide a spreadsheet summary for lump sum amounts detailing how the total was calculated.
- If claims are in **foreign currency**, use a spreadsheet to summarize expenses by the type of expense, with the date, description and translation for each expense. Use PeopleSoft conversion rates whenever possible. Otherwise, use Oanda average conversion rates.