

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). Unsupported expenses will not be reimbursed.

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 \$500/receipt for out-of-pocket expenses**. Contact your administrator **BEFORE PURCHASE IS MADE** for purchase options exceeding \$500/receipt including 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 *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 pre-approval from the Dean. TAP forms must be listed on the claim and marked and non-reimbursable.

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).

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 screen print 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. *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. If purchased on corporate card it must be included on the claim and marked as non-reimbursable.

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.

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). HAP forms must be listed on the claim and marked and non-reimbursable.*

Associated Accommodations Costs: Hosted by Friends/Family – purchase of a gift as modest gesture of appreciation limited to \$20/day to 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. 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

NEW Policy Changes

- Internet/telephone charges
- Cellular Phone Charges
- Rental Vehicle Insurance

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/day (Newspapers, tipping, water, coffee etc...)

Private Automobile:

Kilometer allowance \$0.50

per km for use of a private vehicle; **reimbursed only for travel up to maximum 1000 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.



Internet or Telephone Charges

Limited to portion of actual cost related to U of A business, receipt required.



Cellular Phone Charges

Personal cellular phone usage while travelling on business, itemized receipt from cellular phone provider, must include all pages of the monthly statement and proof of payment.



Tips

A rate of 18% is adopted 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 please refer to [SMS Guidelines for Payments](#).



Ineligible Travel Expenses

- Lost, damaged, or stolen personal property belonging to the traveler (ie. Clothing, laptops, cell phones, cameras, electronic equipment, personal identification, luggage)
- All cost 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 relating to in town conferences, Seminars and meetings (within a 25km radius)
- Value of redeemed reward points, personal air credits, and gift cards for the purpose of U of A travel and expenses
- Cost to secure and obtain a passport and/or Nexus 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 the 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. ie. 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

- Purpose of the trip, including names of conferences, details of meetings, departure and return dates
- For research or special purpose project, the travelers 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 or P-Card are to be included on the claim and marked as non-reimbursable, copies of the 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 and from the 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 itinerary that is submitted
- Conference, meeting and event agendas
- Google maps outing mileage claimed (only if claiming mileage)