

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 [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 written 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 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.