

TRAVEL GUIDELINES

for completed POLICIES and PROCEDURES, please refer to
http://www.uwo.ca/univsec/mapp/section2/mapp216_procedure.pdf

- Submit claim within 60 days after the date of completion
- Expenses for a group can only be claimed by the most senior person present. Expenses cannot be claimed by an individual that are incurred by his/her approver
- Individuals travelling under research supported grants or contracts must maintain one claim per trip/event. If there is a requirement for more than one claim, the subsequent claim must reference the initial claim.

Purpose of Trip

Indicate the relationship between the trip and the research project (i.e. name of conference, workshop or meeting). If the claimant is not the Principle Investigator (PI), specify the relationship to the PI (i.e. student, Postdoc, visiting scientist, collaborator, etc.)

Conferences

Attach a copy of front cover of conference prospectus/programs; include dates of conference/workshop, breakdown of conference fees (i.e. meals, events, etc.)

Receipts

1. **Original, itemized receipts** are required for all expenses except for mileage claims, parking meters, valet parking, tolls and reasonable gratuities paid in cash. **Credit card sales slips, credit card statements, cancelled cheques and travel agency statements are not acceptable receipts**
2. If receipts are lost, never received, or are in a foreign language, an attestation form must be completed by the claimant and signed by the approver. The attestation form can be found at the link below and should be submitted to Financial Services along with a proof of payment (i.e. credit card statement) where possible. Attestation Form: <http://www.uwo.ca/finance/travel/docs/attest.pdf>
3. Receipts should be sent to Cathy Jiang as soon as your claim is submitted.

Cash Advances

1. Cash Advances will be processed for a minimum of one thousand (1000) dollars. Cash Advances for lesser amounts will only be considered where funds are used to cover research subject fees.
2. All Cash Advances must be cleared by submitting an Expense Report to Financial Services within sixty (60) days following the completion of the activity.
3. Expenses will not be reimbursed until travel has occurred. Out-of-pocket expenses can be reimbursed, in advance of the activity, through a Cash Advance.

Daily Meal Reimbursement

Employees will be reimbursed for the actual meal expenses as per the itemized receipts. Please refer to the Treasury Board of Canada Meal Allowance guidelines. These guidelines include gratuities and taxes. For travel in Canada & USA: <http://www.njc-cnm.gc.ca/directive/index.php?sid=98&lang=eng>, and for travel outside of North America : http://www.njc-cnm.gc.ca/directive/app_d.php?lang=eng

Hospitality

Reception and hospitality expenses must be charged to a University account designated for such expenses. **The purpose of the event, including the name of the group, the number of individuals involved, or the names of guests**, must be listed on the Expense Report. **Original, itemized receipts** are required for reimbursement.

Accommodations

Claims for accommodation with colleagues, friends or relatives, in lieu of hotel accommodations, must state the name and address of such individuals. No receipts are required. Please refer to the Treasury Board of Canada Travel Directive: <http://www.njc-cnm.gc.ca/directive/index.php?sid=98&lang=eng>

Air and Rail Travel

Travellers are expected to book the lowest-priced, non-stop economy airfare available when booking domestic air travel. All train travel is expected to be at the best value for money consideration. A boarding pass is required if travel is to be charged to a Tri-Council grant. When electronic boarding passes are used, please note this on the claim.

Private Vehicle

1. Use of private vehicle should be limited to travel where no suitable public transportation is available or where a private vehicle is more economical and effective considering all factors such as costs, time constraints, itinerary, etc.
2. For current kilometric reimbursement rates when using a private vehicle while on approved University business, look to the Treasury Board of Canada Travel Directive: <http://www.njc-cnm.gc.ca/directive/index.php?sid=97&%20lang=eng>
3. If a traveller claims mileage, fuel costs cannot be reimbursed.

Insurance

1. Flight cancellation insurance is an allowable expense and should be obtained when there is a possibility that the Claimant may be unable to travel or when the ticket purchased is "non-refundable." A receipt is required.
2. Expenditures for air travel accident insurance will not be reimbursed.
3. Health care insurance (i.e. Blue Cross) for travel outside Canada is allowable for Claimants who are not regular full-time employees of the University. Full-time employees are covered for travel outside Canada under existing insurance coverage.

Supplies

1. General expenses such as office supplies and stationery are not normally considered direct costs of research. If such expenses are being applied to any Tri-Council grant, a justification explaining how they are essential to the research activity should be retained by the individual processing the transaction. More detailed information is available at the following Tri-Council link, which can also be found on webpage. http://www.nserc-crsng.gc.ca/doc/Professors-Professeurs/ExpenseSupplies-DepensesArticles_eng.pdf
2. The preferred method for procuring supplies is through the University's Electronic Purchase Requisition System, purchasing card or preferred vendor agreements. Purchases of necessary supplies valued at \$500 or less will be reimbursed using the Expense Report only in the following instances:
 - a. when the Claimant is away from the University on a field trip, at a conference or other professional meeting;
 - b. when it is more economical to obtain a "personal" subscription for a professional journal than to pay the University rate; or
 - c. when it is more practical for an individual considering all costs and time constraints.

Alcohol

Alcohol is not reimbursable or allowable if the project or program being charged is externally funded, i.e. NSERC. If you had alcohol with your meal and plan on charging that meal against an external grant account, please deduct it from the receipt and, **in the details, state that you did so.**

Note

1. Different rules may apply depending on the guidelines from different granting agencies. Research Finance will help determine which travel expenditures are reimbursable under a particular grant or contract.
2. The Travel Policy Supplement document as related to Research can be found at the following link: http://www.uwo.ca/univsec/mapp/section2/mapp216_research.pdf
3. When filing meal expenses in a Travel Expense claim you have two options:
Option #1: Add up all your breakfast receipts and claim the total under *Meal Breakfast - (TB rate)* being sure to indicate how many breakfasts you are claiming under the details. You can repeat this for lunch and dinner.
OR
Option #2: Add up all your receipts and claim under *Meal All Day Receipts - (TB rate)* being sure to indicate how many days you are claiming for under the details. If you are missing a meal receipt (perhaps because breakfast is included in your hotel charge or the conference provided lunch etc), then explain that in the description box in the Details screen.