

# TRAVEL CLAIMS AND EXPENSE GUIDELINES

## Definition of Travel is as follows:

*" when in the normal course of business activity, an individual must leave their work area to fulfill a general job (or academic) duty or to attend a conference, seminar, meeting or workshop relating to the individual's employment or fulfilling an academic obligation." **Work area** is defined as: "any point within and up to 25 km outside the municipal area in which the claimant's office or primary place of work is located. For any claimant who does not have an office or primary place of work the geographic area in which the employee is required by the terms of their employment to carry out their assigned duties."*

### AIRFARE

- Enter the date you booked flight, not the date you flew.
- Please use the exact GST amount on your receipt as the GST rate that automatically populates in People soft may not always be accurate.
- Include boarding passes and receipts when submitting claim.

### ACCOMMODATIONS

- Take out additional costs like Internet, Room Service Meals, Telephone, etc. These costs need to be entered separately.
- Telephone, Internet, Room Service must be entered under appropriate categories.
- If you are claiming room service meals, you cannot claim Per Diem for that particular meal.
- To break out GST of a HST total is as follows:  
ONTARIO/QUEBEC/PEI/NB/NFLD:  $HST \times 5 / 13 = GST$   
NOVA SCOTIA:  $HST \times 5/15 = GST$   
BRITISH COLUMBIA:  $HST \times 5/12 = GST$
- The rate that automatically populates in People soft for GST is not always accurate. Please figure out the GST based on your receipts and calculations above, and enter this amount.
- There is no GST for hotels outside of Canada.
- You are able to claim hotel for check-in the day before conference, and check-out the day after conference ends. (Eg: conference dates July 1-5<sup>th</sup>; you may check in June 30 and check out July 6 and claim for the nights of June 30-July 5<sup>th</sup>)

### PER DIEM/MEALS

- 45 CDN/USD for Canada and US per day (10 for breakfast, 10 for lunch, 25 for dinner)
- 66 CDN for International (15 for breakfast, 15 for lunch, 36 for dinner)
- If conference includes a meal, remember to subtract this from your per diem accordingly.
- You are able to claim per diem for travel one day prior and one day after depending on your flights. (Eg: conference dates July 1-5<sup>th</sup>; you may claim per diem from June 30 to July 6)

#### **Please note:**

**The individual travelling may claim breakfast if departure is 7:30 am (from home) or earlier or later (to home); lunch if departure time is 1 pm (from home) or earlier or return time is 1 pm or later (to home); dinner if departure time is 6:30 pm (from home) or earlier or return time is 6:30 pm or later (to home)**

- You have the choice to either claim Per Diem OR Meals with receipts.
- Take GST from the receipts, do not use the GST amount that Peoplesoft populates
- If you claim Meals with Receipts, please include actual restaurant receipt and not just the credit card receipt

## GENERAL

- **Expense Reimbursements** are to be compiled until a minimum threshold of \$100 or every 4 months is met. (Please note: you can use several speed codes on one claim form.)
- PER claims must be entered as a separate claim. This claim and its receipts are sent to HR for separate review.  
Mail to Carmen Grant 2-60 University Terrace
- Please indicate reason for travel in People soft claim as well as when you submit your receipts
- Include proof of attendance at a conference (name tag, program, etc.).
- Please indicate how travel relates to research grant funding the travel.
- Include names of people if travel is for meeting, or a business meal
- If claiming for extra days other than the day before and after event, please include reason and purpose to longer stay.
- For guide lines for **eligible and ineligible** expenses, go to the U of A Home page and type in eligible expenses in the search box and you will get all eligible and ineligible expenses for SSHRC, Professional Expense(\$1400 per year) & Travel and Expense.

