**Expense Claims**

Graduate students submitting expense claims must use UW’s online claim submission system called Concur. With prior permission from their supervisor, students may claim research-related expenses. Meal expenses may not be covered, therefore please check with your supervisor to obtain approval and the amount allowable. All claims are subject to departmental approval.

Expenses incurred must be reasonable, an efficient use of university resources, and related to university business. Personal expenses will not be reimbursed.

Expense claims must be submitted as soon as possible before the 120 days. Claims submitted after 120 days from the receipt date, travel end date, or research study end date require an explanation in the Concur claim for the reason of the delay. An approval from the highest level of reporting is also required (i.e., the Dean in a faculty, the VP, Associate VP or Associate Provost for academic support units) this is in addition to normal reviews and approvals for the claim. This will only be considered in rare circumstances.

**Concur**

Concur can be accessed via the Finance Resources webpage:

[Concur | Finance Resources (uwaterloo.ca)](https://uwaterloo.ca/finance-resources/financial-systems/concur)

To sign in, use your WatIAM credentials:

* Username: WatIAM@uwaterloo.ca
* Password: your WatIAM password
* Two-factor authentication (2FA) is required to sign in

If you are not set up as a Concur user, you can request access by emailing the Financial Coordinator in your home department. For MSE students, please contact Rosalind Klein at rosalind.klein@uwaterloo.ca and provide your WatIAM user ID, student number, and supervisor’s name.

Concur manuals, guides and training videos can be accessed here:

[Concur Training | Finance Resources (uwaterloo.ca)](https://uwaterloo.ca/finance-resources/training-reference-material/concur-training)

**Before you travel**

Review the relevant reimbursement policies below:

* [What is an original receipt? | Finance Resources (uwaterloo.ca)](https://uwaterloo.ca/finance-resources/guidance-procedures/procedures-info/original-receipt)
* [Guidelines for Expenses | Finance Resources (uwaterloo.ca)](https://uwaterloo.ca/finance-resources/expenses/guidelines-expenses)
* [Travel | Research (uwaterloo.ca)](https://uwaterloo.ca/research/financial-management/types-spending/travel)
* [Policy 31 – University Expenses | Secretariat (uwaterloo.ca)](https://uwaterloo.ca/secretariat/policy-31-university-expenses)

Note:

* International travel requires a travel approval form to be completed. Ask your supervisor to sign and send the completed form to Rosalind Klein at rosalind.klein@uwaterloo.ca. You can find the form on the Waterloo International website:

[Student travel safety | Waterloo International | University of Waterloo (uwaterloo.ca)](https://uwaterloo.ca/international/travel-safety-and-security/student-travel-safety)

* You will need to save all **itemized receipts** from the vendors that show the name of the company, description of items/services purchased, date, amount, and method of payment. Credit card statements are not considered itemized receipts.
* Travel expenses are eligible when travelling directly from the closest airport (i.e., Toronto Pearson) to the destination within the dates of the conference (the University allows one day before and one day after the conference ends for travel time). If you are not travelling directly to the destination within the dates allowable then a quote for a **cost comparison** at the time of booking needs to be provided. The lesser of the actual cost vs the quoted cost can be submitted in the claim. If there are personal days added, include a comment in the claim and ensure any expenses associated with personal travel are removed.
* The most direct base level economy airfare (Coach/Standard/Flex or equivalent) at the lowest logical fare/rate is the standard and allowable fare.
* The rate for a standard, single occupancy room at the lowest logical rate is the standard and allowable rate.

**When Preparing a Concur Claim**

* Ask your supervisor which work order and activity number to use, as you need to update this in the ‘Header’ of the claim.
* Complete the Research Travel Information form and include it in the claim
* Create a separate expense line item in Concur for each expense and include the corresponding itemized receipt.
* Comments in the claim should be added to explain and identify each expense. This helps the reviewers have a thorough understanding of your claim.
* Per diems can be claimed for meals for yourself (if meal expenses are approved by your supervisor). You must use the per diem calculator in Concur to calculate your number of eligible days. Meals provided by the conference, or breakfast provided as part of accommodation, cannot be included in this calculation. Meals with attendees require itemized meal receipts.
* Include the conference agenda/daily schedule and ensure that it includes the name of the conference, location, and dates (if not included in the agenda, attach the conference webpage that shows this information; note that a link to the webpage is not accepted). This can be included as expense type ‘additional documentation’.
* If you received a **Graduate Student Research Dissemination Award** (GSRDA), include a comment in the claim, attach the award notification email from GSPA, and apply the amount of award received to the claim. Also include documentation from the conference that shows the paper you presented (page number, your name, title of paper). To apply for the award, please see link below:

[Graduate Student Research Dissemination Award application | Graduate Studies Forms | University of Waterloo (uwaterloo.ca)](https://uwaterloo.ca/forms/graduate-studies/graduate-student-research-dissemination-award-application-0)

* For further information (i.e., allowable meal maximums, use of a personal automobile, mileage, gas usage, etc.) please refer to the Guidelines for Expenses:

[Guidelines for Expenses | Finance Resources (uwaterloo.ca)](https://uwaterloo.ca/finance-resources/expenses/guidelines-expenses)