

Travel Claims- C&O Grad Student Checklist

This document has been prepared to help ensure that student travel claims adhere to University of Waterloo and research sponsor policies. Following these guidelines will help expedite your reimbursement. Please refer to *Waterloo Policy 31* (including the related guidelines) and the Office of Research Website for further information about spending on research accounts

Travel Advances- It is *strongly* encouraged that all C&O graduate students obtain a cash advance prior to date of travel. To make a request please send an email to the Department Coordinator requesting an advance of the estimated costs of travel (airfare, conference fees, accommodations). Upon return from the trip, please bring all original documents, receipts and boarding passes to Department Coordinator, to reconcile the claim.

Conference Documentation- If you attend a conference, your claim must contain a copy of the prospectus including an overview (title, location, dates) and a sample of the daily agenda.

Timeliness- Travel claims should be finalized and submitted as soon as the trip is complete to allow time for review and processing; claims older than four months require Dean approval.

Foreign exchange- support must be attached for the foreign exchange rate used. Acceptable options are a copy of the debit or credit card statement (confidential information removed), conversion using Oanda.com, or the actual conversion receipt (when exchanging cash).

Receipts- *original* itemized receipts must be submitted (which show proof of payment); credit card slips alone are not sufficient. Meals included on hotel bills must be accompanied by an itemized receipt.

Mileage- if you drive an owned vehicle more than 500 km (one way), you must provide justification for your decision to drive (cost comparisons must be done in advance of trip). You cannot claim mileage for use of a vehicle unless it's owned by your or an immediate family member within the same household.

Personal expenses- cannot be charged to research accounts, including costs related to personal travel before or after a research trip. If the dates of your travel don't align with the dates of a conference, provide an explanation and ensure that personal costs are not claimed. A cost comparison may be needed.

Boarding Passes- must be included with your claim; if e- boarding passes were used, ensure a screen shot is taken.

Alcohol- ineligible on most research accounts.

Shared costs- it is preferable that travelers pay for their own expenses; the individual who incurred the cost will be reimbursed. If someone incurs a cost on behalf of others, this person

claims the entire amount and should make a note of the names and affiliations of the individuals who shared the item(s) purchased.

Note: failure to follow the above guidelines, could result in a delay of processing your claim.

Questions- If you have questions about Waterloo Policy or the processing of your claim, please contact the Department Administrator.

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