Process and Guidelines for Reimbursement of Travel Expenses

If you are traveling for the purpose of research (e.g. attending a conference) ALL original detailed receipts are required to substantiate requests for reimbursement.

Things to Keep in Mind before you Travel:

Bus, Rail, and Taxi
Original passenger ticket stub or ticket stub equivalent, including detailed cost information is required.

Air Travel
Original invoice and boarding passes must be submitted. When smartphones are used to present electronic boarding passes, a notation must be made on the travel claim to indicate that paper boarding passes are not available. The Claimant must also attest that they will not claim the refund of their ticket elsewhere.
NOTE: Only Economy class is eligible for reimbursement.

Use of Claimant’s Owned Vehicle
Reimbursement is on a per kilometre basis only. Rates other than those published in uWaterloo’s Guidelines will not be paid. Claimant must report kilometres driven. Flat rates will not be paid. Maximum 500km.

Rental car
Use of the university contracted service provider is preferred. Original, detailed receipts must be submitted when using a vendor other than the contracted service provider. Original, detailed gas receipts must be submitted for reimbursement.

IMPORTANT: The University reimburses the Claimant for use of his/her owned vehicle or use of a rental car to a maximum of a 500 kilometre radius from the university and limits the amount of reimbursement beyond the maximum. The university requires that travel beyond the 500-kilometre radius from the traveller’s base is by way of public transportation (i.e., plane, train or bus) unless public transportation is not available. In the situation where the Claimant seeks reimbursement for travel beyond 500 kilometres on a per kilometre basis, the Claimant must provide a quote for an alternative method of transportation and an explanation why the Claimant’s owned vehicle/rental car was used. The university will pay the most economical means of transportation.

Hotel Accommodation
Original, detailed receipts must be submitted. If booked on-line, a detailed hotel reservation is acceptable only if no detailed receipt is provided on check out. A detailed reservation must indicate dates, type of room, rate, total cost and method of payment. Detailed, express checkout documents are also accepted.

Conference Prospectus/Agenda
A Claimant must submit a copy of conference agenda/prospectus/program with his/her travel claim indicating the dates of the conference/workshop and breakdown of conference fees. (i.e. meals, events, etc.)

Incidental expenses (e.g. parking or traffic fines, passport fees, etc.)
Ineligible

Meals
Original, detailed receipts are required. A credit or debit card slip alone is not acceptable. NOTE: Alcohol is ineligible.
Maximum meal costs (detailed in the chart below):

It is recognized that meal costs vary depending on the destination. Actual, reasonable meal expenses are reimbursable **up to the maximum per day** specified in the chart below when supported by original, detailed meal invoices/receipts.

<table>
<thead>
<tr>
<th>Meal</th>
<th>Within Canada</th>
<th>Outside Canada &amp; in North America</th>
<th>Outside North America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>17.50</td>
<td>20.00</td>
<td>31.25</td>
</tr>
<tr>
<td>Lunch</td>
<td>17.50</td>
<td>20.00</td>
<td>31.25</td>
</tr>
<tr>
<td>Dinner</td>
<td>35.00</td>
<td>40.00</td>
<td>62.50</td>
</tr>
<tr>
<td>Maximum per day</td>
<td>70.00</td>
<td>80.00</td>
<td>125.00</td>
</tr>
</tbody>
</table>

■ the chart provides the amounts for specific meals as a **guideline** only.
■ this chart does not imply an allowance. The rates are for meals that are eaten.

### Preparing and Submitting your Travel Claim for Expenses Incurred

(NOTE: A separate travel claim form should be completed for EACH claimant for EACH trip)

1. Obtain a Travel Advance and Settlement Claim Form from:
   Receptionist
   Department of Electrical and Computer Engineering
   EIT 3033B

2. Complete the form and attach ALL original detailed itemized receipts.

3. The form must be signed by both you and your supervisor.

4. Submit your completed form and original receipts to:
   Andrea Piños / Anne Jenson / Betty Slowinski
   Department of Electrical and Computer Engineering
   EIT 3043/ EIT 3042 / EIT 3044

**NOTE:** In the event an original receipt(s) is lost you should contact the vendor (e.g. hotel, etc.) to get a replacement. Should efforts to replace the receipt(s) fail, you may submit a written explanation of the expense(s) and the reason for the missing receipt(s).

Your signature certifies that no original receipt is available, the expense was on behalf of the University, the item and amount of the expense are accurate, and no other reimbursement of the expense has been or will be sought or accepted from any source. Documentation showing proof of payment, i.e. credit card charge slip, record of charge and billing statement, canceled check or other record of payment must be included. This statement may only be used on a limited, exception basis only and usage is monitored by Finance.

**PLEASE SUBMIT ALL CLAIMS WITHIN FOUR (4) MONTHS OF TRAVEL**

For more detailed Guidelines for Travel Expenses please visit: [http://uwaterloo.ca/secretariat/guidelines-travel-expenses](http://uwaterloo.ca/secretariat/guidelines-travel-expenses)
Travel Advance and Settlement Claim Checklist

Have you included the following information/documentation with your Travel Advance and Settlement Claim?

- Dates of travel
- Destination and reason for travel
- Traveler’s affiliation with the Signing Authority paying for travel through his/her account (e.g. PhD student supervised by Professor X.)
- Signature of Claimant
- Signature of Signing Authority on the account covering travel costs
- Boarding Passes for Air Travel
- Conference Registration receipt
- Bus/Train/Taxi receipts (original)
- Rental Car receipt (original)
- Gas receipts (original)
- Hotel receipt (original)
- Conference Agenda
- Credit Card Statement(s) to prove payment and confirm exchange rates
- Meals – detailed original itemized receipts for each meal eaten. NOTE: Meals provided at conferences are not reimbursed unless paid for separately (e.g. banquet).

To help you track your meal receipts, consider using the table below:

<table>
<thead>
<tr>
<th></th>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
<th>Day 4</th>
<th>Day 5</th>
<th>Day 6</th>
<th>Day 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Lunch</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Dinner</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Total / Day</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>
Travel Advances

Normally, a Claimant incurs travel expenses personally and the university pays approved travel expenses on a reimbursable basis. To minimize the personal and financial impact of business travel expenses the university can provide a travel advance to reimburse for out-of-pocket expenses incurred prior to the date of travel, such as payment for airline tickets or conference registration fees. Requests MUST be submitted 4 weeks in advance of travel to:

Andrea Piños / Rosalind Klein / Betty Slowinski
Department of Electrical and Computer Engineering
EIT 3037/ EIT 3043 / EIT 3044

Travel Advance Checklist

☐ Complete the top portion of the Travel Advance and Settlement Claim (form 50A-2).

☐ Attach original receipts showing payment information for airline tickets, conference registration fees, etc. A proposed travel itinerary is not sufficient.

☐ Attach the program or agenda for conferences and meetings.

☐ Attach a detailed list of anticipated expenses. Please ask an ECE financial support person (named above) or refer to the Travel Guidelines http://uwaterloo.ca/secretariat/guidelines-travel-expenses webpage to determine if proposed expenses are eligible for reimbursement.

☐ Obtain your Supervisor’s signature

☐ Submit your completed form and receipts/documentation to:

Andrea Piños / Rosalind Klein / Betty Slowinski
Department of Electrical and Computer Engineering
EIT 3037/ EIT 3043 / EIT 3044

Graduate Studies Research Travel Assistantship

The Graduate Studies Office (GSO) and the Graduate Studies Endowment Fund (GSEF) assist Faculties, departments and research supervisors to pay travel expenses of graduate students who present results of University of Waterloo research programs at professional conferences. Students should use a Research Travel Assistantship form https://uwaterloo.ca/graduate-studies/forms to reserve travel funds from the Graduate Studies Office.

Confirmation of presentation and the abstract may be submitted with the Travel Advance and Settlement Claim after travel and are not required with this application for funding. The amount reserved per student by the GSO will not exceed $450.