Research Travel Claim Quick Reference Tool

This Quick Reference Tool is for reference purposes only; it is not meant to be attached to claims. Its use is optional. This tool does not replace the University of Waterloo Travel Policy or the Guidelines for Travel Expenses; please refer to them for further detail.

Authorization
○ Claimant
○ PI or delegate[1]
○ One Over One
○ Dean (> 4 months)

General
○ Affiliation if traveler not PI (research only)
○ Date(s) of travel
○ Destination(s) of travel

Trip Purpose[2]
○ Detailed trip purpose including the circumstance for the travel and the reason why the travel was necessary for the research funded by the grant
○ Includes the name(s) of people or location(s) visited (ideally attaching an agenda or invitation)

Miscellaneous
○ Exchange rate support[3]
○ Receipts are itemized
○ Receipts include proof of payment

Conferences
○ Prospectus including agenda (research only)
○ Travel dates align with conference dates (explanation provided where unclear)

Meals and Hospitality
○ Maximums are considered
○ Name(s) / affiliation(s) for hospitality
○ No alcohol (research only)
○ Actual expenses claimed[4]
○ Receipts are itemized (including hotel meals)
○ Justification for meals purchased when included in conference fee

Transportation
○ Justification for mileage > 500km (one way)
○ Mileage claims include destinations & dates
○ Fuel receipts for rented or UW vehicles only
○ Boarding passes included or note made
○ Class of travel is economy or equivalent
○ Justification for baggage fees (3 or more)
○ Flight change or cancellation fees are justified and related to research

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[1] Student travel must be signed by the PI

[2] Including a detailed trip purpose is required for Tri-Agency grants and a best practice for other grants. The conference name, the location or person visited or generic purposes such as "research meeting", "collaboration", "fieldwork" etc. are not satisfactory trip purposes. Sample trip purpose: *"To attend the research conference on ABC (the circumstance) which is relevant to my grant funded research on XYZ because ….(the reason)"*

[3] Can be supported by credit card or bank statements, Oanda (use buy rate +3%) or currency exchange receipts

[4] If a grant specifically allows per diems, the portion of the agreement noting this should be included with the claim