

Seminar Expense Claim – Information Sheet

This document has been prepared to help ensure that travel arrangements and claims adhere to University of Waterloo policies. Following these guidelines will help expedite your reimbursement. Please refer to [Waterloo Policy 31](#) for further information. An [Expense Claim Form](#) can be submitted.

- **Personal Information and Expenses** – Please complete your personal information in the Expense Claim form, as well as the reason for request. Also, list your expenses including the dates when each expense was incurred, descriptions, the dollar amounts under either 'Travel' or 'Other', exchange rates (if applicable), and the total amount of each expense. At the bottom of the claim please provide your signature (as the claimant).
- **Timeliness** – Expense claims should be finalized and submitted as soon as the trip is complete to allow time for review and processing. Please send the completed expense claim form as an attachment to rosalind.klein@uwaterloo.ca, and include all supporting documentation as a second attachment (i.e. one file with all receipts, boarding passes, etc. in the same order that they are listed in the expense claim form).
- **Receipts** – Electronic copies of the original itemized receipts must be attached, and must reflect what was purchased and the method of payment (credit card slips alone are not sufficient). Meals included on hotel bills and/or purchased as part of your travel must be accompanied by an itemized receipt. Note that maximums apply (please contact Rosalind Klein for meal limits).
- **Mileage** – The rate is 59 cents per kilometre. 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). An individual cannot claim the kilometre rate for a borrowed vehicle. Rented vehicles should be rented at the lowest logical fare/rate (i.e. economy class).
- **Personal Expenses** – The following personal expenses are not reimbursable: laundry, long distance personal phone calls, passport fees, personal baggage fees in excess of one carry-on and one checked bag, access to airport lounges, stopover costs (where the stopover was unnecessary), travel expenses for family members. The following expenses are reimbursable: travel to/from airport, airport parking, travel visa and visa delivery fees, travel expenses arising from unforeseen events necessitating a change to travel plans (i.e. natural disaster, adverse world events, airline bankruptcy).
- **Airfare and Boarding Passes** – The itinerary, airfare invoice and receipt, boarding passes, or boarding pass equivalents, must support a travel claim for airfare. Travel by air is authorized at economy class only. The flights must be booked directly from your place of origin to UW (and return), and the dates must coincide with the invitation dates. If this is not the case, a cost comparison must be included with the expense claim. The cost comparison consists of a price quote from the airline (obtained when you booked your flights, as it cannot be obtained after the flights have taken place) that shows what you would have paid had you booked the flights directly to UW (and return) within the invitation dates. Reimbursement of airfare will not be granted for cancelled flight bookings, unless it is due to unforeseen events (eg; traffic accident on the way to airport, weather conditions). It is recommended that travel cancellation insurance is purchased.
- **Accommodations** – Hotel, motel, and other lodging expenses are limited to reasonable amounts and do not exceed the single occupancy rate. The original detailed receipt must be submitted, including the method of payment. Accommodation in a private and non-commercial setting (i.e. accommodation with friends or family) is eligible to a maximum of \$50.00 per day and is expected to be a reimbursement for costs incurred to thank the host for the stay (note that the host's full name and address, and beginning and ending dates of the stay must be provided).

Questions – if you have questions about the University of Waterloo (UW) Policy or the processing of your claim, please contact Rosalind Klein, Financial Coordinator, Department of Management Sciences, (519) 888-4567 Ext. 34410 or rosalind.klein@uwaterloo.ca