

Research travel claims – information for students

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 – a travel advance can be requested to minimize out-of-pocket expenses incurred prior to travel for items already purchased such as conference registration or airfare.

Purpose – for Tri-Agency grants, the trip purpose must describe how the travel is a direct cost of the grant funded research.

Affiliation – the travel claim must state your affiliation to the grant.

Conference documentation – if you attended 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), or conversion using Oanda.com¹.

Receipts – original itemized receipts must be attached (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). You cannot claim mileage for use of a vehicle unless it's owned by you or an immediate family member within the same household. Rate is 59 cents/km.

Meals – per diems are used

| Meal | within Canada | Outside Canada |
|---------------------|----------------------|-----------------------|
| Breakfast (.25) | 20.00 | 25.00 |
| Lunch (.25) | 20.00 | 25.00 |
| Dinner (.50) | 40.00 | 50.00 |
| Daily Maximum(1.00) | 80.00 | 100.00 |

¹ Use buy (ask) rate + 3%



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 claimed². A cost comparison may be needed³.

Boarding passes – are not required

Alcohol – ineligible on most research accounts. If claimed, provide sponsor confirmation of eligibility.

Shared costs – travelers must pay for their own costs; 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.

Questions – if you have questions about Waterloo Policy or the processing of your claim, please contact the appropriate Research Finance Coordinator.

² Personal costs include meals and accommodation expenses for vacation days before or after the conference

³ Travel costs comparisons must be completed at the time of booking travel arrangements; more information about when the comparisons are needed can be found on the Office of Research Office of Research website