

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; processing timelines must be adhered to.

Purpose – for Tri-Agency grants, the [trip purpose](#) must describe how the travel is a direct cost of the grant funded research. Examples can be found on the [Office of Research website](#). The [Research Travel Claim Information form](#) can be used to document the purpose.

Affiliation – the travel claim must state your [affiliation](#) to the grant. The [Research Travel Claim Information form](#) provides examples.

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), conversion using Oanda.com¹, or the actual conversion receipt (when exchanging cash).

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.

Meals – must be supported by itemized receipts; maximums apply. Refer to [Waterloo Policy 31](#) for details.

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

¹ Use buy (ask) rate + 3%



dates of a conference, provide an explanation and ensure that personal costs are not claimed². A cost comparison may be needed³.

Boarding passes – must be included with your claim; make a note if e-boarding passes were used.

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

Shared costs – it is preferable that travelers 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 your academic department, institute, or school. If you have questions about expense eligibility on research accounts, please contact the appropriate Research Finance Training and Compliance Officer.

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](#)