

Original Approval Date: August 20, 2012

Most Recent Editorial Date: July 11, 2017

Parent Procedure: [Travel Expense Procedure](#)

Travel Expense Procedure

Appendix A: Schedule of Allowable Travel Expenses

Office of Administrative Responsibility:	Supply Management Services
Approver:	Associate Vice-President (Finance and Supply Management Services)

Contact for questions about this procedure:	SMS Customer Service 780-492-4668 customerservice@sms.ualberta.ca
--	--

The following list identifies all travel expenses that are reimbursable to an Employee or Visitor (Non-Employee). If an expense does not appear on this list, it is not a reimbursable expense. An original itemized receipt must provide a description of the services purchased. Unsupported expenses where original itemized receipts are required will not be reimbursed. If the original receipt has been lost, the claimant must request the vendor to reissue the receipt. Photocopies of receipts and credit card receipts are not acceptable supporting documentation.

In all cases, documentation outlining the purpose of the travel must be included with the claim. This can include the traveler's meeting itinerary, conference schedule or other documentation outlining the specific travel details and purpose of the trip.

Reimbursable Expense	Expense Details	Required Supporting Documentation
Air Fare	<p>Actual fares paid. Only the lowest available airfare can be charged. In all cases due regard for economy must be considered.</p> <p>Business, executive, or first class fares for flights outside of Canada and the USA (excluding Hawaii) are reimbursable with written pre-approval only.</p> <p>Personal travel may be added but all additional costs are the sole responsibility of the employee.</p>	<p>Original ticket receipt, including itinerary and proof of purchase (invoice). *It is a requirement to have the fare class booked and travelled displayed on the supporting documentation.</p> <p>If a business, executive, or first class fare was purchased, written approval by the claimants Dean or Vice President, prior to the travel being booked, must be attached to the claim. *Original receipt.</p> <p>Personal travel may be added to a business trip, however; all additional costs are the sole responsibility of the employee. The traveler is required to submit written proof supporting the cost of the travel without the personal portion and may only claim the lesser of the return fare from the original destination or return from personal destination added.</p> <p>BOARDING PASS RETENTION - Boarding passes are not required when one or all of the</p>

		following are submitted with the original air travel ticket: receipts showing the breakdown of itinerary and costs, taxi receipts (where applicable), hotel receipts and certificate of conference attendance.
Associated Air Fare Costs: <ul style="list-style-type: none"> • Baggage Fees • • • Seat Selection Fees • Flight Cancellation Insurance 	<p>One checked bag to and from the travel location, (additional bags may be reimbursed with justification to exceed the limit attached to the expense claim).</p> <p>The exact cost to secure advanced seat selection.</p> <p>The exact cost to secure cancellation insurance.</p>	<p>In all circumstances, the original itemized receipt is required.</p>
Accommodations	<p>Limited to standard single occupancy (with a private bathroom) rate in a business class hotel, or whatever class of available accommodation is the least expensive/most reasonable. Bookings at conference hotels are encouraged, even if cheaper accommodation can be found in the city. If a conference hotel is not being booked, the traveler should book at one of the hotels on the University's travel agency site, which provides CAUBO and other special rates.</p> <p>The use of luxury accommodation (e.g. resorts or upgraded accommodations) will not be reimbursed without justification and prior written approval by the budget owner.</p>	<p>Original itemized receipt.</p> <p>Original itemized receipt and supporting documentation from the budget owner approving the upgraded accommodation.</p>
Associated Costs (Accommodations) <ul style="list-style-type: none"> • Hosted by Family/Friends • Valet or Bellhops • Laundry Services 	<p>Purchase of gift as modest gesture of appreciation limited to \$20 per day to a maximum of \$300 for the entire stay.</p> <p>Reasonable gratuities for service.</p> <p>Reimbursement for actual cost (Limited to duration of travel over 7 days).</p>	<p>Original receipt required.</p> <p>Original receipt (if applicable) .</p> <p>Original receipt, unless included in hotel invoice.</p>
Vehicle Rental	<p>Limited to a compact, mid-size, or full-size vehicle depending upon justifiable need. Rental fees, kilometer charges, fuel charges, and insurance coverage are reimbursable.</p>	<p>Rental agreement or receipt. Document provided must include information on the type of vehicle rented, the breakdown of charges, and proof of payment.</p>
Private Automobile	<p>Kilometer allowance - \$0.50 per kilometer.</p> <ul style="list-style-type: none"> • Rough road supplement of \$0.04 per kilometer. • Once maximum of 11,625 km per calendar year has been claimed, the reimbursement rate changes to \$0.31 per kilometer. 	<p>Include Travel itinerary (google map printout).</p> <p>*No receipts required for km rate.</p>
Ground Transportation e.g. Taxi, Bus, Train	<p>Actual cost of fare paid plus gratuity (if applicable).</p>	<p>Original receipt required for all fares paid in excess of \$75 incl. gratuity for the entire trip. Ground transportation under \$75 for the entire</p>

		trip – *no receipt is required.
Meals (Allowance Rates)	<p>The maximum allowance rates that can be claimed are as follows. Faculties and units may set lower amounts prior to travel as deemed appropriate (e.g.: – group fieldwork where grocery purchases are the norm).</p> <p>Travel within Canada or USA Full day rate \$60 CAD and \$60 USD/day Breakfast only - \$15 CAD/USD Lunch only - \$15 CAD/USD Dinner only - \$30 CAD/USD Travel outside Canada and USA Full day allowance rate \$85 CAD/day Breakfast only - \$20 CAD/day Lunch only - \$20 CAD/day Dinner only - \$45 CAD/day</p>	<p>Allowance Rates are mandated for travel meals. Meal costs that exceed the allowance rate may be reimbursed at the discretion of the approver but only if they are receipted; provide a reason for exceeding the allowance rate and deemed reasonable and appropriate.</p> <p>*No receipts required for allowance rates.</p>
Receipted Travel Meals	<p>Actual cost of meals including gratuities.</p> <p>Can only be claimed when the meal cost has exceeded the meal allowance rate and may be reimbursed at the discretion of the approver but only if they are receipted; provide a reason for exceeding the allowance rate and deemed reasonable and appropriate.</p> <p>The purchase of alcoholic beverages or meals otherwise provided (e.g. meals included in conference registration or cost of accommodation) cannot be claimed.</p>	<p>If a claimant paid for meals for others, reimbursement will be based only on original receipts, supported by a list of names of attendees and the business purpose of the expense. Claimant will not be reimbursed for the allowance rates for others.</p> <p>*Original receipts required.</p>
Incidental Allowance Rate	<p>A maximum of \$10 per day can be claimed for incidentals. Incidentals can include newspaper, coffee, muffins, phone calls, tipping, etc. This rate can only be claimed when travel includes an overnight portion and is claimed in CAD currency only.</p>	<p>*No Receipts required for incidental allowance rates. The \$10 rate is a maximum per day. If your expenses were less; you must claim the lower amount.</p>
Hospitality	<p>Reimbursement for actual cost. Refer to Hospitality, Working Sessions/Meetings and University Employee Functions Procedure for a summary of Eligible Expenditures.</p>	<p>Original itemized receipt to include date and purpose of event, number and names of attendees, and cost of alcohol per person (if applicable).</p>
Parking	<p>Actual cost of off-campus parking.</p>	<p>Original receipt, unless for metered parking.</p>
Conference Fees	<p>Limited to fees for required conference activities. Reimbursement for actual cost.</p> <p>*Optional conference activities, e.g. golf tournament are not reimbursable.</p>	<p>Original receipt; conference, meeting and event agendas.</p>
Internet or Telephone Charges	<p>Limited to portion of actual cost related to University business.</p>	<p>Original receipt required, unless included in hotel invoice.</p>
Travelers Medical Insurance and Vaccinations	<p>Limited to travel outside of Canada and the U.S. Reimbursement for actual cost.</p>	<p>Original receipt.</p>
Visas and Travel Papers	<p>Reimbursement for actual cost.</p>	<p>Original receipt.</p>
Foreign Exchange	<p>Reimbursement for actual cost or 7 day</p>	<p>If 7 day PeopleSoft average is applied – no</p>

Fees	PeopleSoft average.	receipt required. If actual cost is applied, copy of University Travel Card or personal credit card statement displaying the actual charges must be attached.
-------------	---------------------	--

DEFINITIONS

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [▲Top](#)

Travel	<p>When in the normal course of business activity, an individual must leave their work area to fulfill an academic research or general job duty or to attend a conference, seminar, meeting, workshop and field research relating to the individual's employment or fulfilling an academic obligation. Work area is defined as: any point within and up to 25 km outside the municipal area in which the claimant's office or primary place of work is located. For any claimant who does not have an office or primary place of work, the geographic area in which the employee is required by the terms of their employment to carry out their assigned duties.</p> <p>Reimbursement of travel expenses to the University/Edmonton for any employee who does not reside in the Edmonton area are not eligible unless explicitly noted in that employee's employment contract.</p>
Original Itemized Receipts	The detailed receipt provided by the merchant/supplier. An online receipt or internet "invoice" is considered an original receipt in the case of an internet purchase. An original Visa / MasterCard chit is not considered an original receipt.

RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca. [▲TOP](#)

[Hospitality, Working Sessions/Meetings and University Employee Functions Procedure](#)