

**Original Approval Date: August 20, 2012**

**Most Recent Editorial Date: December 1, 2018**

**Parent Procedure: [Travel Processes & Expense Procedure](#)**

## Travel Processes & Expense Procedure

### Appendix A: Schedule of Allowable Travel Expenses

<b>Office of Administrative Responsibility:</b>	Supply Management Services (SMS)
<b>Approver:</b>	Associate Vice-President (Finance and Supply Management Services)

<b>Contact for questions about this procedure:</b>	<b>SMS Customer Service</b> 780-492-4668 customerservice@sms.ualberta.ca
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The following list identifies all travel expenses that are reimbursable to an employee, student or visitor (non-employee). If an expense does not appear on this list, it is non-reimbursable expense. Expense details and required supporting documentation are provided below.

Reimbursable Expense	Expense Details	Required Supporting Documentation
<b>Air Fare</b>	<p>Actual fares paid. Only the lowest available airfare displayed on the U of A Travel Management website for the most direct route 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 in the following circumstances:</p> <ul style="list-style-type: none"> <li>• Medical condition necessitates an upgraded travel class.</li> <li>• A business reason can be demonstrated.</li> <li>• Travel is outside of Canada and the USA (excluding Hawaii).</li> </ul> <p>Personal travel may be added to U of A travel however all additional costs are the sole responsibility of the claimant. The use of the TAP process cannot include any personal portion of travel. Personal travel must be booked and remitted independently of all U of A processes, payment methods and booking tools.</p>	<p>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, Director, Associate VP or Vice President, prior to the travel being booked, must be attached to the claim.</p> <p>Original receipt.</p> <p>Medical condition requires a doctor's note.</p> <p>The claimant is required to submit written proof supporting the cost of the round-trip airfare 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><b>BOARDING PASS RETENTION</b> - Boarding passes are not required when one or all of the following are submitted with the original air travel ticket: receipts showing the breakdown of itinerary and costs, taxi</p>

Reimbursable Expense	Expense Details	Required Supporting Documentation
		receipts (where applicable), hotel receipts and certificate of conference attendance.
<b>Associated Air Fare Costs:</b> <ul style="list-style-type: none"> <li>• Baggage fees</li> <li>• Seat selection fees</li> <li>• Flight cancellation insurance</li> </ul>	<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>	In all circumstances, an itemized receipt is required.
<b>Accommodations</b>	<p>Reimbursement is limited to a standard single occupancy rate (with a private bathroom) in a business class hotel, or whatever class of available accommodation is the most reasonable or most efficient (such as a conference hotel which, while not necessarily the most economical, will avoid taxi and other ground transportation charges and offer a safe and efficient location for conference attendees). The use of luxury accommodation (e.g. resorts, 5 Star or upgraded accommodations) will not be reimbursed without written <u>justification</u> and pre-travel approval by the budget owner. Justification can include location of the event/meeting, availability, U of A business purpose and party size, (for multiple U of A claimant's attending the same event, a two bedroom suite may be more economical than two standard rooms).</p>	<p>Itemized receipt.</p> <p>Upgraded accommodations: supporting documentation from the budget owner pre-approving the upgrade and the justification.</p>
<b>Associated Accommodation Costs</b> <ul style="list-style-type: none"> <li>• Hosted by family/friends</li> <li>• Valet or bellhops</li> <li>• Laundry services</li> </ul>	<p>Purchase of gift as modest gesture of appreciation limited to \$20 per day to a maximum of \$300 for the entire stay. Cash gifts or gift cards paid to hosts are not reimbursable. Alcohol is not eligible and not reimbursable.</p> <p>Reasonable gratuities for service.</p> <p>Reimbursement for actual cost (limited to duration of travel over 7 days).</p>	<p>Receipt required.</p> <p>Receipt (if applicable).</p> <p>Receipt, (if not included in incidental allowance rate).</p>
<b>Vehicle rental</b>	Limited to a compact, mid-size, full-size or SUV vehicle depending upon justifiable need. Rental fees, kilometer charges, fuel charges, and insurance coverage are reimbursable.	Rental agreement or receipt. Document provided must include information on the type of vehicle rented, the breakdown of charges, and proof of payment. Upgrades must be justified in writing and attached to the travel

Reimbursable Expense	Expense Details	Required Supporting Documentation
		expense claim.
<b>Private automobile</b>	Kilometer allowance - \$0.50 per kilometer. <ul style="list-style-type: none"> <li>Rough road supplement of \$0.04 per kilometer.</li> <li>Mileage is limited to 1000 kilometers per entire trip (unless justified, documented and pre-approved by the Budget Owner).</li> </ul>	Travel itinerary is required (google map printout that includes to and from location).  No receipt required for kilometer rate.
<b>Ground transportation e.g. public transit, train, taxi, and ride share service</b>	Actual cost of fare paid plus gratuity (if applicable).	Train service requires receipts at all times.  If public transit, taxi or ride share service is used, the cost including gratuity is <\$75 and it can be demonstrated the service is for U of A business, no receipt is required. E.g. Airport to hotel, hotel to airport, hotel to event location, and event location to hotel.
<b>Meals (allowance rates)</b>	The maximum allowance rates that can be claimed are as follows. Faculties, departments and units may set lower amounts prior to travel as deemed appropriate (e.g.: – group fieldwork where grocery purchases are the norm). Please note that these rates include GST when the travel occurs in Canada and should be claimed accordingly.  <b>Travel within Canada or USA</b> Full day rate \$60 CAD and \$60 USD/day Breakfast only - \$15 CAD/USD Lunch only - \$15 CAD/USD Dinner only - \$30 CAD/USD <b>Travel outside Canada and USA</b> Full day allowance rate \$85 CAD/day Breakfast only - \$20 CAD/day Lunch only - \$20 CAD/day Dinner only - \$45 CAD/day	Allowance rates are mandated for travel meals. Meal costs that exceed the allowance rate may be reimbursed at the discretion of the budget owner but only if they are receipted; provide a reason for exceeding the allowance rate and deemed reasonable and appropriate.  Where meals are provided at no additional cost (such as with conference registration or accommodations) an allowance rate or receipted meal cannot be claimed. The meal allowance rate cannot be claimed for meals where hospitality has already been claimed.  Claimant will not be reimbursed for the allowance rates for others.  *No receipts required for allowance rates.
<b>Receipted travel meals</b>	Actual cost of meals including gratuities.  Can only be claimed when the meal cost has exceeded the meal allowance rate and may be reimbursed at the discretion of the budget owner but only if they are receipted; provide a reason for exceeding the allowance rate and deemed reasonable and appropriate.  The purchase of alcoholic beverages or meals otherwise provided (e.g. meals included in conference registration or cost of accommodation) cannot be claimed.	If a claimant paid for meals for others, the Hospitality, Working Sessions, Meeting and University Employee Function Procedure applies. Reimbursement will be based only on original receipts, supported by a list of names of attendees and the business purpose of the expense.  Where a meal receipt is not attached the claimant will be reimbursed the meal allowance rate only.  Receipts required.
<b>Incidental allowance Rate</b>	A maximum of \$10 per day can be claimed for incidentals. Incidentals can include newspaper,	No receipts required for incidental allowance rates. The \$10 rate is a maximum per day. If

<b>Reimbursable Expense</b>	<b>Expense Details</b>	<b>Required Supporting Documentation</b>
	coffee, muffins, phone calls, tipping, etc. This rate is claimed in CAD currency only.	actual expenses were less; the lower amount must be claimed.
<b>Hospitality</b>	Reimbursement for actual cost. Refer to Hospitality, Working Sessions/Meetings and University Employee Functions Procedure for a summary of eligible expenditures.	Itemized receipt to include date and purpose of event, number and names of attendees, and cost of alcohol per person (if applicable).
<b>Parking</b>	Actual cost of parking (excludes primary work location).	Receipt, (metered parking does not require a receipt if it is not available).
<b>Conference fees</b>	Limited to fees for required conference activities. Reimbursement for actual cost.  *Optional conference activities, e.g. golf tournament are not reimbursable.	Receipt; conference, meeting and event agendas are required.
<b>Internet or telephone charges</b>	Limited to portion of actual cost related to U of A business. Refer to Travel Processes & Expense Procedure for examples.	Receipt required, unless included in hotel invoice.
<b>Cellular phone charges</b>	Personal cellular phone usage while traveling on U of A business. Refer to the Travel Processes & Expense Procedure for detailed example of how to apply expense.	Itemized receipt from cellular phone provider. Must include all pages of the monthly statement and proof of payment.
<b>Claimants medical insurance and vaccinations</b>	Limited to travel outside of Canada and the U.S. Reimbursement for actual cost.	Receipt.
<b>Vehicle insurance</b>	The cost to secure vehicle insurance that includes collision waiver, loss damage waiver and third party liability insurance	Receipt that relates to the vehicle rental.
<b>Visas and travel papers</b>	Reimbursement for actual cost.	Receipt.
<b>Foreign exchange fees</b>	Methods of applying exchange rate: <ul style="list-style-type: none"> <li>• 7 day PeopleSoft average (supported currency).</li> <li>• Actual CAD currency charge on U of A travel card or personal credit card.</li> <li>• OANDA currency converter (only for Non-PeopleSoft supported currency).</li> </ul>	If 7 day PeopleSoft average is applied – no receipt required.  If actual cost is applied, copy of U of A travel card or personal credit card statement displaying the actual charges must be attached.  OANDA rate requires printed copy of Oanda rates for the first and last day of travel.

DEFINITIONS Refer to the [Travel Processes & Expense Procedure](#)

## **RELATED LINKS**

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

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