

Category:	Travel & Finance	Approval:	Associate Dean, Research & Graduate Studies
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Purpose

To provide a clear, step by step, standardized procedure for graduate students seeking financial reimbursement from the University (regardless of funding sources) for travel related expenses.

Scope

This policy applies to ALL graduate students in the Faculty of Applied Health Sciences.

Policy

There are **two** kinds of travel claims for graduate students: **Conference Travel** and **General Travel**

Conference Travel

- Graduate students travelling to a conference to present either a paper, or a poster, are eligible to apply for travel assistance funds to the Faculty of Graduate Studies and the Graduate Students Association, as well as to the FAHS, to help cover their travel expenses (e.g. airfare, food, gas, etc.).
- A student may receive travel assistance funds only once per fiscal year (May 1 - April 30)
- More information on the Faculty of Graduate Studies web site (Internal Financial Support - <https://www.brocku.ca/graduate-studies/current-students/financial-support/internal/travel-expenses>)

The student:

- Must be a full-time graduate student.
- Must be presenting at the conference.
- Supervisor must also contribute some financial support towards this travel.
- MUST submit a Faculty of Graduate Studies - Application for Travel Funds (found on: <https://www.brocku.ca/graduate-studies/current-students/financial-support/internal/travel-expenses>) IN ADVANCE of travel to the FAHS Graduate Program Coordinator, Bev Minor.

General Travel

Graduate students who are required to travel as part of their graduate program (i.e. travel supported in full, or in part, by the Supervisor as part of their studies) do not need to submit a Faculty of Graduate Studies - Application for Travel Funds form. However, before their travel arrangements are made they should discuss all details with their supervisor in order to have a clear understanding what expenses will, and will not, be covered by their supervisor.

Claiming Travel Reimbursements

- The choice of travel mode must always be based on the most economical fare.
- Travel claims can only be submitted in a timely manner (within 30 working days of travel) AFTER travel is complete. Anything submitted more than 6 months after travel will not be reimbursed.
- If the travel expenses are related to **Conference Travel** - *complete travel support documentation* must be submitted to the FAHS Graduate Program Coordinator, Bev Minor.
- If the travel expenses are related to **General Travel** - the completed *Travel & Expense* claim form (<http://www.brocku.ca/finance/faculty-and-staff/forms>) must be submitted with *complete travel support documentation* to your Supervisors' Departmental Administrative Assistant.
- **ALL** travel claims must be accompanied by **COMPLETE travel support documentation**.

What is 'Complete Travel Support Documentation'?

Proof of Travel

- A copy of the section of the program that shows your name and presentation (highlight this please), and cover of program (showing conference name and date).

Train/Airfare/Bus

- A complete print out of your reservation / booking receipt (as these print outs can be quite long please highlight your name and the amount of money you were charged)
- A boarding pass with your name on it.

Car Travel

- You can claim EITHER mileage or gas - not both.
- To claim mileage (to a *maximum* of 1000km return trip):
 - Check the Standard Kilometers List for Travel Reimbursement document (Finance - Personal Reimbursement Policy and Procedures page: <http://www.brocku.ca/finance/Policies-and-Procedures/Personnel-Reimbursement>)
 - If your destination is not listed - print out a Google/Bing/Mapquest map showing the distance you travelled in KM and attach this to support your claim.
- To claim gas:
 - Include gas receipts (dated during travel and no later than the date of return)

Accommodations

- Hotel/residence/hostel receipt in your name and showing amount paid.
- For prepaid online bookings provide the entire printout showing your name and the amount you paid (once again please highlight these)

NOTE: if room service is used you **MUST** obtain an **itemized receipt** showing what was ordered or these charges will not be covered.

NOTE: in room extras (movies, in-room bar items, etc.) are not reimbursed.

Food

- Itemized receipts **ONLY**- The debit or credit card receipts showing only the amount paid are **NOT** sufficient and will not be reimbursed.

NOTE: no alcohol is reimbursed.

NOTE: itemized receipts must be obtained for room service charges as well.

NOTE: meals can be expensed. Candy/snacks may not be claimed.

Foreign currency claims

- If you are traveling to another country your receipts may be in a several different currencies. Submit each individual currency on separate Travel & Expense claim forms.
- Choose whether you wish to be reimbursed in Canadian or American funds.
- Attach a currency conversion sheet (XE.com is the most commonly used) to each receipt submitted.

OPTION - if the charge has already appeared on your credit card statement you may submit a copy of the credit card statement (black out any unrelated items as well as any personal information **except for your name**) along with the original receipt.

OPTION - if you have a number of similar receipts (meals, etc.) you may opt to tally all the receipts and submit one currency exchange sheet for the total amount.

Sharing Expenses

Graduate students often share expenses. There is nothing wrong with this practice. However, it does present some challenges to Finance in terms of tracking the reimbursements while following the CRA/TriCouncil/granting agencies/Auditors reporting regulations.

In **ALL** cases where expenses are shared each graduate student in the group should fill out their own individual Travel & Expense form **AND** all sharing parties should submit their claims and **original** receipts in the **same** folder accompanied by a written explanation detailing the specifics of your groups' arrangement.

For **Conference Travel** claims bring all of the original receipts, along with the written explanation, to the FAHS Graduate Program Coordinator, Bev Minor.

More details = better

Travel Advances

- Travel Advances are not directly available to graduate students.
- To obtain a Travel Advance the graduate students' supervisor would have to agree to take on the burden of the expenses and post-travel reporting (i.e. take a Travel Advance in their own name - even if it's payable to the graduate student).

FAQ

What receipts should I keep?

- Keep everything - it is better to throw it away after you've determined that it is not required, or it is an ineligible expense, than to not have it.
- All receipts must be the original receipt.

How much detail should I include?

- More information is better. Include dates, conference names, and detailed explanations (including emails from your supervisor explaining what they are willing to fund).

I am travelling to a country where it may be difficult to get official receipts (e.g. Cuba) what should I do?

- Contact Finance well in advance of travel and they will help you. Do this before travelling, not after.

Ask!

- There are no stupid questions!
- If you have a question - ask your supervisor, the Graduate Program Coordinator (Bev Minor), the Budget Officer (Suzanne Gabriel), or contact Finance.
- Ask BEFORE you travel.

Related policies and information

Personnel Reimbursement Policy and Procedures

<http://www.brocku.ca/finance/Policies-and-Procedures/Personnel-Reimbursement>

- Travel and Related Expenses
- Ineligible Expense List
- Meal Per Diem Rates (for applicable research accounts only)
- Standard Kilometers List for Travel Reimbursement

Faculty of Graduate Studies - Internal Financial Support

- Travel Expenses (<https://www.brocku.ca/graduate-studies/current-students/financial-support/internal/travel-expenses>)

Amendments (revision history)

Date revised	Responsible