

<u>Business Purpose of Travel</u>		<u>Research Purpose of Travel</u>
Claim Header	Non-Research Claim	Research Claim
	<p>York University will reimburse its employees for reasonable expenses incurred by them on behalf of the University or, in the course of University academic or administrative business. Employees will be reimbursed for the most direct and economical mode of travel available, considering all circumstances. It should be noted that employees will not be reimbursed for additional costs incurred for indirect routes or stopovers taken for personal reasons.</p>	<p>If the claim is not for the Principal Investigator, the claim needs to indicate the person's affiliation to the research - collaborator, visitor, etc. For PER (Professional Expense Reimbursement) claims need to explain how expenses are directly related to your research or scholarly activities</p>
Hospitality	<ol style="list-style-type: none"> 1. Itemized receipts are required 2. List of attendees with names of organization need to be attached to the claim 3. Indicate business purpose of hospitality <p><i>In general costs claimed should be reasonable.</i></p> <p><i>Alcoholic beverages will be permitted for internal hospitality (benefit of York employees, students, or governors) with the advance approval of a VP or the President</i></p> <p><i>Alcoholic beverages will be reimbursed for external hospitality (benefit are not York employees, students or governors) if incurred at a moderate level appropriate for the circumstance</i></p> <p>Additional information about Administer a Hospitality Expense can be found here</p>	<ol style="list-style-type: none"> 1. Itemized receipts are required 2. List of attendees - names of organization and their affiliation to the research to be attached to the claim 3. Indicate Research purpose of hospitality <p><i>In general, costs claimed should be reasonable, and No alcohol is allowed on research grant</i></p> <p>Additional information about Administer a Hospitality Expense can be found here</p>
Membership Fees	<ol style="list-style-type: none"> 1. Membership Fee Invoice is required 2. Provide business purpose 3. Only the membership fees for the current year can be claimed 	<ol style="list-style-type: none"> 1. Membership Fee Invoice is required 2. Provide how it relates to research (fund 400 and fund 500); For PER how it relates to scholarly and research activities 3. Only the membership fees for the current year can be claimed
Internet	<ol style="list-style-type: none"> 1. Attach bill from internet provider 2. Provide business purpose 3. Only eligible when the employee's job requires significant internet access to monitor systems overnight 	<ol style="list-style-type: none"> 1. Attach bill from internet provider 2. Provide how related to research or scholarly activities 3. Can only claim on your Professional Expense Reimbursement fund (PER) to a maximum 50% of the cost

Expense Type	Required Documents & Reminders
Airfare or Train	<p>Copy of receipt and itinerary that shows the to/from destinations and the class of fare booked.</p> <p>Note: If you are not choosing the most direct route, you must attach the quote obtained at the time of booking to show that the amount claimed is the same or lower than the most direct lowest economy class. According to the policy, employees will not be reimbursed for additional costs incurred for indirect routes or stopovers taken for personal reasons.</p> <p>If there is no lowest economy airfare available at the time of booking, please provide the quote when claiming the expense to demonstrate that you chose the lowest economy fare available.</p> <p>If the travel booked is not the lowest economy fare, and you are claiming the full amount. The appropriate pre-approval for the fare booked needs to be attached when submitting the claim.</p> <ul style="list-style-type: none"> - Business Class requires VP pre-approval. - Premium Economy requires pre-approval from one over one. If there is no pre-approval, a policy deviation approval is required from your Dean/VP. <p>Additional information about the Travelling by Air can be found here.</p>
Hotel	<p>Itemized hotel invoice detailing charges including type of room booked</p> <p>Note: The lowest price standard room can be claimed, appropriate pre-approval is needed if claiming a non-standard room with a higher price.</p> <p>Additional information about the Meals & Accommodations claim can be found here.</p>
Automobile Rentals	<p>Provide auto rental invoice that includes: a) Pick up and return date; b) Daily rental rates; c) Itemized charges and the total charge</p> <p>Note: The Corporate Travel Card provides Collision Damage, the claim won't be reimbursable if the coverage is declined when renting a vehicle using the Corporate Travel Card. Employees who choose to secure a rental vehicle with a credit card other than the Corporate Travel Card will assume any insurance costs (unless prior written approval is obtained from Risk Management Services).</p> <p>Any special purpose vehicles required may also require additional insurance coverage. Please consult with Risk Management before renting any vehicle</p> <p>Additional information about Travelling by Automobile can be found here</p>
Conference Attendance	<p>Conference Registration Invoice. The Conference Agenda/Program that details dates of the conference and if meals provided is also required to be attached to the claim</p>
Per Diems	<p>No receipts required, indicate on the claim the # of days/meals claimed - max per day is \$65 CAD in Canada and \$65 USD outside</p>
Incidentals Claim	<p>No receipts are required. Claim \$10 CAD (only) per day up to a maximum of 10 days</p>
Mileage	<p>No receipts required; Rate is 0.45/km</p>
Goods	<p>Small purchases can be claimed, including itemized invoices for business purposes. Most purchases should be made via SmartBuy or PCard if possible.</p>