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Parent Policy: Supply of Goods and Services Policy

Travel Processes and Expense Procedure

Appendix A: Schedule of Allowable Expenses

Office of Administrative Responsibility:	Finance, Procurement and Planning (Procurement and Contract Management)
Approving Authority:	Chief Financial Officer and Associate Vice-President (Finance, Procurement and Planning)

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 a non- reimbursable expense. Expense details and required supporting documentation are provided below.

Reimbursable Expense	Expense Details	Required Supporting Documentation
Airfare	Airfare must be booked through the UofA Travel Management Company by completing and submitting a Travel Authorization form (TAP). Exception: Some destinations require market specialization and bookings may need to be completed through a booking agency with local expertise (e.g. Asia and Europe. contact smstrvl@ualberta.ca for prior approval).	Itemized digitized receipt. When an airfare class is upgraded, approval documentation emailed from the Dean, Director, AVP or VP is required. Supporting documentation that indicates the value of the UofA portion of travel when personal travel has been added to the business travel (itineraries and demonstrated cost of the most economical, direct return route is required).
Associated Airfare Costs: **Baggage fees** **Seat selection fees** **Flight cancellation insurance**	One checked bag to and from the travel destination is eligible for reimbursement. Additional bags may be reimbursed when the expense claim includes	Itemized receipt. Expense is ineligible if itemized digitized receipt is not provided. (credit card statement is not sufficient).

	justification to exceed the limit. The exact cost to secure advanced seat selection. The exact cost to secure cancellation insurance.	
Accommodations	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 Hotel Authorization Process (HAP) process can be used for accommodation bookings. Details are available in the procedure.	Itemized digitized receipt. Upgraded accommodations: supporting documentation and justification from the budget owner or one over one pre-approving the upgrade. HAP Process - direct billing by the hotel. Prepare, submit and retain a copy of the agreement.
Associated Accommodation Costs: **Hosted by family/friends** **Valet or bellhops service** **Laundry services**	Limited to $20 per day to a maximum of $300 for the entire stay. Currency: Location In Canada: (CAD currency is used when completing the PeopleSoft expense claim). Location in USA or Internationally: (USD is used when completing the PeopleSoft expense claim) Code to accommodations (503231). Reasonable gratuities for service. PeopleSoft Currency: In Canada (CAD) USA and International (USD) Code to miscellaneous expenses Reimbursement for actual cost (limited to duration of travel over 7 days).	Receipt not required. Receipt not required (maximum daily rate is $10/day). Itemized digitized receipt (if applicable).
Vehicle Rental	Limited to a compact, mid-size, full-size or SUV vehicle depending upon justifiable need. Rental fees, kilometer charges, fuel charges, road tolls and insurance coverage are reimbursable.	Itemized digitized receipt. Rental agreement. Document provided must include information on the type of vehicle rented, rental period, the breakdown of charges, and proof of payment.

		Upgrades must be justified in writing and attached to the travel expense claim. Itemized digitized gas receipt is required (credit card statement is not sufficient).
Vehicle Insurance	The cost to secure vehicle insurance includes collision waiver, loss damage waiver and third party liability insurance for rental vehicles only.	Itemized digitized receipt.
Private Automobile	Kilometer allowance - $0.50 per kilometer. Rough road supplement of $0.04 per kilometer (only applies to the portion that is rough road, secondary road). Mileage is limited to 1,000 kilometers per entire trip (unless justified, documented and pre-approved by the Budget Owner or one over one).	A Google Map that includes the travel itinerary is required. A Google Map indicating portion travel on rough roads. No receipt required for kilometer rate.
Ground transportation e.g. public transit, train, taxi, and rideshare service	Actual cost of fare/service paid plus gratuity (if applicable).	If ground transportation is used and the cost per ride (including gratuity) is <$75 and it can be demonstrated the service is for UofA business, no receipt is required. e.g. Airport to hotel, hotel to airport, hotel to event location, and event location to hotel. Currencies: In Canada (CAD); In USA (USD); Internationally (USD). Ground Transportation =>$75 must include itemized digitized receipt from the provider. Credit card statements are not acceptable.
Meals (allowance rates)	The maximum allowance rates that can be claimed are identified below. Faculties, Colleges, departments and units may set lower amounts prior to travel as deemed appropriate (e.g. group fieldwork where groceries are purchased to provide meals). Please note that these rates include GST when the travel occurs in	Allowance rates are mandated at the university. No receipts required for allowance rates. Where meals are provided at no additional cost (such as with conference registration or accommodations) an allowance rate cannot be claimed.

	Canada and should be claimed accordingly. Meal allowance rates include incidental allowance rate. Travel within Canada (CAD) or USA (USD) $70 Full day rate Breakdown: $10 incidental rate; $15 Breakfast; $15, Lunch; $30 Dinner. International Travel (CAD) $95 Full day rate Breakdown: $10 incidental rate; $20 Breakfast; $20 Lunch; $45 Dinner. Note: Hawaii can be processed in USD or the international rate (determined by the traveler)	The meal allowance rate cannot be claimed for meals where hospitality has already been claimed. Conference agenda to support meals provided at the event. Claimants cannot claim allowance rates on behalf of others.
Hospitality and Event meal reimbursement	Reimbursement for actual cost. Refer to the *Hospitality and Event Expense Procedure* for a summary of eligible expenditures.	Itemized digitized receipt. Itemized receipt to include date and purpose of event, number and names of attendees, and cost of alcohol per person (if applicable). A credit/debit card chit or meal/bar entry on a hotel folio is not eligible for reimbursement.
Parking	Actual cost of parking while traveling on UofA business (excludes primary work location).	Itemized digitized receipt. (Metered parking does not require a receipt when it is not available).
Conference Fees	Limited to fees for required conference activities. Reimbursement for actual cost. Optional conference activities, (e.g. golf tournaments are not reimbursable).	Itemized digitized receipt. Conference, meeting and event agendas are required.
Internet or Telephone Charges	Limited to a portion of actual cost related to UofA business. Refer to *Travel Processes and Expense Procedure* for examples.	Itemized digitized receipt. If charges are applied to an accommodation invoice, no additional receipt is required.
Cellular Phone Charges	Personal cellular phone usage while traveling on UofA business.	Itemized digitized receipt from cellular phone provider.

	Refer to the *Travel Processes and Expense Procedure* for detailed examples of how to apply expenses.	Must include all pages of the monthly statement and proof of payment. For share plan participants, this includes all pages of claimant and share partner(s) statement pages.
Claimant's Medical Insurance and Vaccinations	Limited to travel outside of Canada and the U.S. Reimbursement for actual cost.	Itemized digitized receipt.
Visas and Travel Papers	Reimbursement for actual cost.	Itemized digitized receipt.
Foreign Exchange Fees	Methods of applying exchange rate: 7 day PeopleSoft average (supported currency). Actual CAD currency charge on personal credit card. OANDA currency converter (can only be used for Non-PeopleSoft supported currency).	If a 7 day PeopleSoft average is applied, no receipt required. If actual cost is applied, a copy of the personal credit card statement displaying the actual charges must be attached. OANDA rate requires a printed copy of Oanda rates for the first and last day of travel indicating the dates used.

Definitions Table

- Refer to the definitions table in the *Travel Processes and Expense Procedure*.

Parent Policy Suite

- Supply of Goods and Services Policy
- Competitive Bid, Competitive Bid Exception and Multiple Quote Procedure
- Contracting for Services Procedure
- Corporate Purchasing Card Procedure
- Customs Import, Export and Permit Procedure
- Expense Reimbursement Procedure
- Moving and Warehouse Services Procedure
- Payment Procedure
- Purchase of Restricted Items Procedure
- Purchase Order Procedure
- Shipping (Courier), Receiving and Distribution Procedure
- Travel Card Procedure
- Travel Processes and Expense Procedure
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Related Policy Documents

- Hospitality and Event Expense Procedure

History

August 20, 2012	Approved.
February 24, 2025	Editorial amendment. Formatting and links.

For questions surrounding policy document interpretation or implementation, please contact the Office of Administrative Responsibility.

Contact for questions about this appendix: PCM Travel Management smstrvl@ualberta.ca

The official version of this document may be obtained from https://www.ualberta.ca/policies-procedures/index.html