

## **Business PhD Travel Expenses**

### **Who Pays? How You're Reimbursed?**

Please read **BEFORE** you book, leave, or pay for anything.

*TLDR: Get approval, do not pay for anything yourself in advance, pls make time to read the steps below.*

1. You need to:
  - a) Prepare an estimate of all trip-related expenses. Use the 'Request/Estimate to Use PhD/TEA Funds (Excel spreadsheet)' found in [Forms & Policies](#) (include purpose/reason for trip e.g. attending/presenting, field research, job interviews; with dates; location/city/country).
  - b) Know or ask how are your travel/expenses/travel are to be covered, e.g. use PhD TEA funds, or ask for supervisor funding, or get approved department funding; or if you intend on applying for a travel grant/award.
2. Forward request with a) & b) to supervisor to request their approval. Forward the approval email to Helen. Supervisor's funding must include a speed code.
3. Now bookings, registrations, flights, etc. can proceed with all expenses/costs paid through Helen, on PhD Pcard and TAP. Do Not Pay For Anything Yourself. The PhD Office must track your approvals, funding, expenses, conferences (papers & presentations), travel plan, and reimbursement claims.
4. If you were successful or received funding, e.g. travel grant, award from GPS, GSA, host conference, or another source, forward the documentation to the PhD Office/[busphd@ualberta.ca](mailto:busphd@ualberta.ca) and confirm which trip it applies to. (REMINDER: APPLY FOR GRANTS! You could be \$\$ successful!)
5. Share or discuss your travel plan with PhD Office/[busphd@ualberta.ca](mailto:busphd@ualberta.ca) to ensure you are adhering to UA and PhD travel and expense policies.
6. Procedure to book flights:
  1. As per above, you should have emailed to [busphd@ualberta.ca](mailto:busphd@ualberta.ca) your supervisor's approval of conference, travel details, estimated cost (itemized form found in Forms & Policies) and which fund/speed code to use. Helen will advise if you can proceed to next steps.
  2. Your profile must first be set up on [Concur](#) before requesting flights. Fill in all the personal details **except** flight request.
  3. Email a request to Maritime at [ualberta@maritimetravel.ca](mailto:ualberta@maritimetravel.ca) AND copy [busphd@ualberta.ca](mailto:busphd@ualberta.ca) (or can phone 780-492-7000). Use your @ualberta email. State that you are a Business PhD student and that the PhD office will finalize with a TAP number. Give Maritime the following information:
    - a. Your legal First name (middle name) and Last name as all names appear on your passport;
    - b. Your citizenship and passport number;
    - c. Your date of birth (spell the month);
    - d. Gender
    - e. Your mobile phone number for travel notifications
    - f. Aisle or window seat preference, and frequent flyer number if applicable.
    - g. Inform Maritime that the Business PhD contact is Helen (or Debbie) at [busphd@ualberta.ca](mailto:busphd@ualberta.ca) (or 780-492-5816) for the TAP, speed code and faculty name.

4. Give travel dates and destination (based on conference/research dates and location). If you already searched flights, you can suggest them to Maritime to quote. Standard Fares are preferred (baggage/seat fees are not to be included). A Maritime agent will provide flight options and quotes. Select the most reasonable itinerary and quote. Clearly refer to which flights you have finally chosen. Helen and Maritime will review and follow up to confirm.

5. If you want to add personal days/location you must request a SECOND quote. This quote must be LESS than the cost to attend the specific conference/research dates/location. Comparative quotes are required to file as proof that making personal adjustments did NOT increase the direct cost/purpose of the trip. If traveling with family members, you can work directly with Maritime and must separate the billing.

6. After review of the chosen flights/itinerary (against approved estimates, speed codes) Helen will give Maritime the approval to proceed to booking and provide the TAP number, speed code and faculty name to pay the invoice. After Maritime issues the tickets, review the tickets and travel is confirmed.

Students CANNOT pay for their own flights and hope to be reimbursed. Students are expected to follow all UA and PhD travel policies and procedures on bookings and expenses; details are on [Forms & Policies](#) page. Students travelling on UA business through Maritime are supported and protected in case of travel disruptions.

If student is paying for flights personally, and **not** using University- or PhD-related funds, then they are not obligated to use the UA's travel agent, and are solely responsible if travel disruptions occur.

7. Hotels/accommodations may be reserved with either your personal card or on PhD PCard.
8. If you are staying in a major Canadian city you must first check [HAP hotels](#) for availability and UA room rates. If ideal, make a reservation and send the confirmation number to the PhD office to issue a HAP# to the hotel for payment. Remind hotel of HAP payment and ask for final invoice at check out.
9. After making a reservation, students can prearrange the payment on the PhD PCard (note, you will still pay for any other charges like meals, internet, parking). Contact the PhD Office and the hotel for required authorization forms. This helps students avoid carrying expensive hotel charges on their own card; receiving reimbursement can take up to 2 months.
10. At hotel check-in usually you will be asked for a personal credit card for the stay. If prearranged for payment on PhD card or by HAP#, at check-out you must ask for a final detailed invoice and receipt (daily room charges, fees, and proof of payment). If you pay hotel on your own card you can submit for reimbursement after return. Review the Allowable Expense Policy for travel charges allowed - or not allowed - for claim/reimbursement.
11. To split the cost or share accommodation e.g. expensive conference hotel room or Airbnb with another PhD student, it is best to arrange to split the invoice, or have the invoice show the division owing per guest, and each pay individually so each student has proof of payment of their own invoice and receipt. However, if one student pays for other student(s) then is paid back by those student(s) individually, and submit clear documentation of the exchange of payment and receipts between them (e.g. names and who's paying and receiving in cash, or by e-transfer). Note, sharing/paying sometimes results in inaccurate allocation to students' TEA accounts.

12. Registrations and any charges/expenses that can be paid in advance are to be paid on the PhD PCard. Do Not Pay On Your Own Card. Book an online meeting with Helen (or Debbie) or visit the PhD Office in person to arrange the payment. Prepare to have your 'order' ready on your laptop for payment. The PhD Office will provide the card details which cannot be saved on laptops or the card info must be immediately deleted from student's accounts/laptop afterward. Forward the payment receipt and detailed invoice to the PhD Office/busphd@ualberta.ca.
13. Expenses that students can pay for on own card and submit for reimbursement are items such as baggage fee, taxi/Uber. Items that cannot be easily prepaid or paid for on the PhD card.
14. Follow UA policies and directives regarding university travel:  
Off Campus Intra-provincial & International Travel Medical Insurance  
UGo Off Campus Registry  
Claims Tips by UA for Tomorrow  
 also  
Alberta Health  
Registry for Canadians Abroad  
  
 In PhD Forms Cabinet find documents in Travel and Expenses section:  
 UA Travel Processes & Expense Procedure  
 UA Schedule of Allowable Travel Expenses  
 Request to Use Travel and Expense Account Funds (Excel)  
 PhD Travel Claims Info (PDF)  
 Travel Claim Check List (PDF)

## **WHILE** on your trip

15. Expenses incurred during travel and paid for by the student may be reimbursed if detailed receipts are kept and submitted within 21 days of return and within the fiscal year. Check the Allowable Expense Policy for details about allowances for fares, tipping (max 18%), etc. Only one claim per trip is allowed, so all related expenses must be submitted together.
16. If you are sharing an expense, such as taxi, it is preferred that each person pay their own share and claim their own amount. If one person pays the full amount, they should only claim their portion. The others must provide proof that they paid their share. Separating payments ensures reimbursement is taken from the correct student's fund.
17. There are maximum \$\$ allowed for breakfast, lunch and dinner. Claiming meal per diems is preferred; you may use your meal receipts to support the per diems you want although receipts are not necessary. (Receipts need be **itemized** with all foods and beverages listed.) Reimbursement will not exceed per diem allowance. Meals allowed on travel days is based on the time of departure and return home.
  - Canada or USA  
 Full day rate \$70 CAD/day or \$70 USD/day  
 Breakfast \$15, Lunch \$15 and Dinner \$30 CAD/USD  
 Incidentals \$10 CAD/USD
  - International Travel (including Hawaii)  
 Full day allowance rate \$95 CAD/day  
 Breakfast \$20, Lunch \$20 and Dinner \$45 CAD

#### Incidentals \$10 CAD

18. You cannot claim for meals listed in the conference program as your conference fees include the cost of supplied meals, so you should be consuming conference foods (such as breakfast, snacks or lunch). For some conferences, dinner may be optional/separate registration fee.
19. If you are expected to host/pay for meals for guests, it should be approved in advance and as the payer you should be the most senior person in the group. Be aware of hospitality limitations and allowances for alcohol, tipping, paying, etc. You must keep a record of all who were hosted: names, titles, and organization, plus the detailed/itemized meal orders and payment receipt.
20. Submit the conference program, schedule and/or agenda (at least the front page with title, dates and city) and report the page number(s) if you are listed in the program (i.e. your role other than attendee/delegate/participant, such as presenter, chair, organizer, leader, poster, workshop participant, panelist, judge). This information is used for reporting and applied to School of Business ranking surveys.
21. Be sure your invoices are detailed and matching receipt shows method of payment, even if paid by PhD credit card. It is not acceptable to just submit a credit card receipt or a final total.
22. **You must always make the most economical or reasonable, choices and decisions as possible when choosing/paying/sharing your expenses, and must be for school business purposes.** You must familiarize yourself with and follow the University Travel Processes and Expense Procedure and Schedule of Allowable Travel Expenses (updated Feb 25, 2025 in [Forms and Policies](#).) Expect expenses to be carefully scrutinized by finance reviewers to ensure claims are appropriate and meet policy allowances. You may want to add personal time to conference travel; however costs cannot be higher due to personal needs. Proof (such as flight cost differences) may be required to show your due diligence. If you have any special circumstances please discuss with your supervisor or PhD Office and obtain written approval BEFORE incurring any expenses, to be sure you are covered.
23. Tipping is discretionary but should range from 0% to 15%. Tips over 18% cannot be reimbursed.
24. If you are claiming mileage, you cannot also claim for gas. Gas claims are for rental vehicles.

#### UPON RETURN - GET READY TO SUBMIT FOR REIMBURSEMENT

25. Complete a Travel Claim Checklist. You must ✓check off and attach all supporting documents. Incomplete submissions will not be accepted and returned to the student. Boarding passes are no longer required for claims. Remember: supervisor approval, speed code, agendas, presentation listings, invoices, receipts, card statements, grant funding, everything applicable. Email all documents to [busphd@ualberta.ca](mailto:busphd@ualberta.ca) (do not hand in print outs or paper receipts – scan them please!).
26. For your first claim, you will receive an email to authorize Helen (helen7) and Debbie (gi1) to be a “designated entry authority” in the financial system. Instructions to do this which will take you about 2 minutes. Be sure your banking information is correct in Bear Tracks to receive reimbursement payments.
27. If you have credit card or bank statements showing foreign currency conversions, submit them so you are reimbursed for the exact amount you were charged. Without documentation, the U of A financial system will automatically calculate an averaged currency exchange. We do not require statements as proof of payment in Canadian dollars unless your receipt does not verify that payment was received.
28. If you applied for and/or won/received a travel grant/award (GSA, FGSR, conference, external supporter, you must share the documentation with the PhD office and include it in your travel claim.
29. **Claims should be submitted soon after return, no more than 21 days after a trip or from date of purchase**, and within the fiscal year it is spent (April 1 – March 31). Expenses not submitted within the

proper fiscal period are subject to approval and may not be reimbursable. Only one claim per trip is accepted.

30. Students are responsible for overspending, insufficient funding, or unapproved/unexplained expenses.

*If you have any questions please stop by or email the PhD Office*

*Helen or Debbie will answer them for you!*

*It will save delays, solve problems, or help clear up errors and confusion that might affect your claim.*

*We Appreciate It and Thank You!*