

General Guidelines for T&E Requests:

1. The staff/Faculty/Generalist/Resident Travel and Professional Development Request Fund Form must be completed and submitted to the Department Business Administrator for final financial authorizations and approvals. If there are any issues arising from the application, you will be contacted directly.
 - The request form MUST be signed off by either the RPD or ARPD before submission for review
 - If you are presenting a copy of the abstract must be included
 - Approval for leave form must be included
 - All funds requested must be in CAD funds
 - All anticipated approximate expenses must be listed
2. If the application meets financial approvals/authorizations, a copy of your application will be returned to you.
 - At the bottom will be an account combination code that you will be required to have for submitting your claim after travel has been completed.
3. Travel Claims are now made online via the new financial system, (PeopleSoft Financials); you'll need your CCID and password to access the system. All paperwork must be received in our offices before final online review can proceed.
4. We require ORIGINAL itemized travel receipts (airline ticket, conference registration, hotel and miscellaneous). Please use mandatory allowances.
5. All claims must abide by the university guidelines:
<https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Travel-Expense-Procedure-Appendix-A-Schedule-of-Allowance-Expenses.pdf>
6. **Funding will not be approved retroactively** (i.e. for past academic years) nor will funds be given in advance (i.e. allotment for future years)
7. **The claim must not exceed the approved amount.** When making the claim online, please adjust line items to fit the approved amount. Please ensure you capture GST where applicable or check off the 'no GST' box.
8. Any external funding received/awarded towards travel must be documented in your claim.
9. Any HAP or TAP affiliated with your travel must be documented in your claim.