



ONTARIO AGRICULTURAL COLLEGE

Department of
ANIMAL BIOSCIENCES

Travel/Expense Claims Guidelines & Helpful Information

- If you have incurred expenses and are NOT on payroll you do NOT fill in an expense claim. Please see me regarding reimbursement.
- Use an expense claim for expenses over \$50.00. If you have \$50.00 or less in expenses please use a Petty Cash Voucher. The petty cash voucher can be found on our department website (not the UoG website) under “Files & Forms”
- No alcohol on any meal receipts unless it is hospitality (entertaining people from outside of UoG).
- Any meal receipts for more than 1 person should always have the additional names listed.
- If you have alcohol on your personal meal receipt you must deduct it PLUS the relevant tax. You MUST also adjust the tip portion to exclude the alcohol.
- VISA receipts alone are never sufficient for proof of payment for meals and in some instances other expenses. You must provide a detailed receipt showing what was purchased. If unavailable a missing receipt form must be completed.
- If accommodation receipts have meals they must be broken out and listed as separate items. Detailed receipts for the meals will need to be provided.
- If accommodation receipts have parking included it must be broken out and listed as separate items.
- Shared accommodation. If the hotel will split your bill that is preferable. If one person paid the full amount the best practice is to have that person claim the full amount – do not split it out after the fact. Split coding can be used on the expense claim to charge costs. Please indicate who shared the room with you and indicate their faculty. Exceptions do apply. If you are using NSERC funding for any person sharing the accommodation please see me preferably before you incur the expense.

- If you are claiming a conference registration and there are additional items (excursions, banquets, etc.) they must be broken out and coded accordingly. Excursions and banquets are considered “Hospitality/University Business Meetings”
- Boarding passes must be included with expense claims. More and more funding agencies are requesting the passes as proof of travel. Failure to have these runs the risk of not being reimbursed.
- When claiming mileage, please provide a Google map to verify kms travelled. Dates of travel must be provided as well.
- If you are claiming gas receipts for a personal vehicle you must provide a Google map to justify that you travelled a distance that would require a tank of gas.
- Proof of payment. If an invoice does not show the payment was received then provide your credit card statement.
- Proof of payment is required if expense is paid in cash. Merchant receipts showing cash/debit paid are fine.
- PayPal receipts are never sufficient as proof of payment and will not be accepted on its own. You must provide a receipt from the vendor as well.
- Transport to airport - you can book Red Car Airport Service directly from their website and receive a UoG discount. You will need to provide coding at the time of booking. There is no money exchanged and you will not be out-of-pocket.
- If travelling to Toronto airport in a personal vehicle you can claim a standard 140 km for round trip and no google map is required. This is the mileage from the UoG to Pearson. If you are travelling from a different start point you will need to provide the map to justify mileage.
- When expenses are related to a conference the first page of the program will be required with any claim and subsequent claims for the same conference.
- If you incur an expense for a conference months in advance of the conference (i.e. airfare, registration) you can be reimbursed at that time and do not have to wait.
- Expenses that are previously claimed for travel (i.e. airfare, conference registration) MUST BE referenced on the final claim. It will be a “previously paid” expense. The expense and amount must be indicated. This is not a new rule. It is one I have been doing for everyone but am now requiring you to do.

- University policy is to only pay for expenses one day before and one day after conference dates. Exceptions do apply. Please ask if you are unsure.
- Students are not covered by the UoG health plan for travel outside of Canada. Travel health insurance purchase is an eligible expense on most funding. All students are encouraged to purchase this insurance before travel.
- Gift cards purchased can be reimbursed but you MUST provide the name (and SIN if UoG employee) for all cards. You must also provide acknowledgement from the recipient that he/she has actually received the gift card. If not provided you will not be reimbursed. Best practice would be to avoid gift cards and especially for UoG people – it is a taxable benefit to them.
- When buying gifts as hospitality please ensure they are eligible. Gifts of alcohol or alcohol gift cards are not eligible
- If you wish to receive the exact CDN amount that you paid in foreign currency please provide your credit card statement. Otherwise the UoG approved currency website OANDA will be used to calculate your exchange.
- Please tape (no staples) all receipts to an 8.5” x 11” sheet of paper. As many as can fit on one page. Do not overlap, do not go off the page. The date, vendor, what was purchased and amount need to be visible. Do not leave a detailed meal receipt and VISA receipt attached together. They must be separated. All claims have to be scanned before they go across campus for final review.
- Please number your receipts and provide them taped on paper in order where possible.
- Currency column on claim – name of currency is only required if it is NOT Canadian.
- When completing the claim – supervisor/chair field should be self-explanatory – your advisor and the chair names; supervisor/chair title – just put supervisor, chair. FYI, Dr. Squires is not the Dean and hence no name should be put in that field.
- Please double check your expense start and end dates. Many times they are not correct.
- Please include the vendor name under expense description, i.e. Walmart, Canadian Tire, McDonalds, etc.

- No one single purchase over \$5,000.00 on expense claims.

Common Category Code or Location Tax errors

Category code:

Baggage fee – airfare

Parking – surface transport

Travel insurance – other services 62706

Location Tax examples:

Airfare

Toronto to anywhere in Canada – Ontario

Vancouver to Toronto – Other Province

Toronto to U.S. – Other Province

Toronto to England – Outside Canada.