

TRAVEL CLAIM Tip Sheet

What you need to submit a claim

- 1.** Avoid delays: always complete the “TRAVEL CLAIM FORM” when submitting receipts for reimbursement. Use a separate Claim form for each trip. Complete all relevant fields. Lab members, add your email address and your name as it is on your paycheck. You can change the currency type from “US Funds” to another currency if needed.
- 2.** Collect and submit **original, itemized** (details of purchase) **receipts** for all expenses. Boarding passes are also required if charging to a Tri-Council grant.
- 3.** Complete a ‘LOST/MISSING RECEIPT FORM’ (LRF) for any lost receipts **OR** if the vendor did not provide a detailed, itemized receipt. (This means vendor supplied only a credit card receipt or did not supply any receipt.)

Fill out the entire LRF except the ‘TRAVEL CLAIM #TR’ or “REQUISITION #Q” lines.

- 4.** Include number &/or names of guests for meal or entertainment expenses, keeping claim amount within guidelines for meals and alcohol. (NOTE: Some grants do not allow alcohol. If this applies, deduct cost and taxes of alcohol from receipt total.)

- 5.** Attach the following:

Conference: agenda/prospectus from sponsor’s website (summary & conf poster).

Presenting lecture/participating in seminar or meeting (other than a conference): invitation to participate, correspondence about, or published notice of lecture/presentation.

This backup should show location; date(s) of event; name of sponsor; name of main presenter(s); name of event, class or meeting.

- 6.** Tape (don’t staple) receipts to clean side of scratch paper to avoid losing them. Tape along top, bottom or sides of receipt, not over writing if possible.

Please do *NOT* use highlighter on receipts. Highlighter causes writing to become illegible on many receipts, and any but yellow highlighter can obscure writing in photocopy.

- 7.** ALWAYS clear Travel Advance within thirty (30) days of end of trip.

Contact Virginia (2-2766) or Ava (7-4931) for assistance, if needed.

TRAVEL CLAIM Guide

What you need to submit a claim – a little more explanation for Tip Sheet

1. Always use the “ TRAVEL CLAIM FORM” when submitting receipts for reimbursement. All information requested is needed to avoid delay of your claim.

This form is fillable online, and can be found on the CPS Dept website (www.cellphys.ubc.ca). (A paper copy is also attached to this guide.)

From the CPS home page menu, choose Administration, then Documents, then choose TRAVEL CLAIM FORM. If you have any questions about how to complete the form, contact Virginia (2-2766) or Ava (7-4931).

For lab members, it is helpful to include your email and name of lab for quick reference in case of questions.

2. Collect all your original receipts, and your boarding passes. Boarding passes are not always required, but even when they are not, they are good proof you traveled to the place you intended. Keep a copy of your receipts for your files, in case anything goes missing.

3. If you do not have original, itemized receipts for all your expenses, complete a ‘LOST/MISSING RECEIPT FORM’ (LRF) for each missing receipt. Virginia or Ava can supply these forms, or they can be found on the UBC Finance website, at: <http://www.finance.ubc.ca/fmisw.cfm>, near the bottom of the list under ‘Forms and Instructions’.

Lost Receipt Forms **must** be completed if any receipts have been lost or the vendor did not supply an itemized, detailed receipt for your purchase. If you have only the credit card receipt, an LRF is still needed, because the details of your purchase do not show on the credit card receipt.

Please fill out the entire form except the ‘TRAVEL CLAIM #TR’ or “REQUISITION #Q”. These numbers will not be known until the Claim/Requisition is actually created, and the online system assigns a number.

(NOTE: A complete itemized receipt will contain: **Merchant Name; Date of Purchase; Description & Quantity of each item purchased; Total Cost of Order; sometimes Credit Cardholder Name.**)

4. For meal or entertainment costs, include the number of guests, and “names of individuals involved should be documented if practical.” (UBC Entertainment Expense Policy #84).

4. (Cont'd.)

Some Research grants do not allow charges for entertainment, and/or for alcohol. Also, according to the Faculty of Medicine Entertainment Expense Guidelines:

“In keeping with the guideline developed by the VP’s office regarding Dean’s entertainment expenses, the maximum charge for wine should not exceed \$50 per bottle. In addition, the total cost of alcohol must be less than 35% of the total bill. The excess will not be reimbursed.”

5. Attach a copy of the online poster & summary for the conference attended. If the travel was to deliver a lecture or attend a seminar or meeting other than a conference, attach any correspondence showing the invitation to speak or attend the meeting, or any published notice (e.g., a lecture announcement on a university dept website) showing your participation.

These should show location, date(s), name of sponsor, name of presenter, name of event, class or meeting.

6. To avoid losing receipts tape them to the clean side of a piece of scratch paper. Do not staple them, as every staple will have to be removed for photocopying.

Do not tape over or highlight important information on receipts, as this can cause the writing to become illegible or disappear. Tape along top, bottom or sides. Circle with a pen/pencil amount you wish to indicate.

Always keep a copy of your receipts in case anything is lost in Finance (it happens!).

7. Any Travel Advance taken must be cleared as soon as possible after the travel is completed, through a Travel Settlement Claim.

According to UBC Policy #83, this: “... **must be completed within thirty (30) days of the end of the trip, and forwarded to the Department of Financial Services.**”

No new travel advances will be made to a traveler if a previous advance has not been settled.

The traveler should bring all receipts and other documentation as usual. When these are totaled, the traveler will either pay advanced funds back to the PG (if the full advance was not used), or will be reimbursed for expenses (if additional personal funds beyond the amount of the advance were used).

Contact Virginia (2-2766) or Ava (7-4931) for assistance if needed.