



THE UNIVERSITY OF BRITISH COLUMBIA

Institute for Resources, Environment and Sustainability

Faculty of Science

# Miscellaneous and Travel Expenses Guidelines

(as of June 2023)

This section contains an overview of the key sections of the Business Expense Rules. In case of any discrepancy, the full expense rules will always take precedent ([Business Expenses Policy \(FM8\) | Office of the University Counsel \(ubc.ca\)](#)).

The following guidelines must be met in order for your expense claims to be processed by the finance office – please review these guidelines and ensure they are followed **BEFORE** submitting your claim.

Expense reports should be submitted within Workday by the employee that incurred the expense. The Admin/Finance Assistant can help process expenses **over \$3000**. Please see [Workday - Create an Out of Pocket Expense Report \(service-now.com\)](#) for assistance.

All expense claims should be submitted for reimbursement within 30 days of the expense date unless the total reimbursement is <\$50 in which case claims can be accumulated up to 90 days for submission

Note: There are two different forms for claiming expense. Miscellaneous form must be used for all expenses other than Travel and Meals. All Travel, Meals, and Entertainment must be on the Travel Expense claim form.

## **Important reminders:**

- Please check details with Supervisors before submission
- Students must liaise with Supervisors before approaching administration with grant related questions
- Ensure all the required documentation is attached before you submit your claim; this includes:
  - Original detailed and itemized receipts/invoices for all non-per diem claim items (if unavailable, must claim as “Missing Receipt”);
  - Redacted bank/credit card statements with FOREX rates for foreign currency transactions; AND
  - Completed IRES Travel Claim Form for travel, meals, and entertainment; OR
  - Completed Miscellaneous Expense Form for any other expenses
- If taking multiple trips - a separate claim must be submitted for each trip
- Expenses must be itemized individually (i.e. taxi fares, train fares etc. should be itemized individually and not submitted as one lump sum)
- A valid receipt is required to prove EVO, Car2Go expenses. These are available online.

For any questions, please reach out to the Finance Assistant.

## Travel & Expense Claim Form

1. Include information for purpose of trip: Details of Conference attended or registered for must be included (i.e. poster, invitation) and the conference program and/or its link
2. Where the link to the research is not evident from the supporting documentation, additional explanation needs to be documented which demonstrates that the expenditure is a direct cost of the funded research
3. Hotel receipts must detail ALL TRAVELLERS NAMES for whom the booking was made or an email needs to be attached confirming the travelers names
4. Confirmation of Air travel (boarding passes preferred, hotel receipts, taxi receipts, conference proceeding details or confirmation from PI that travel was required/undertaken) must be included
  - a. Please note: ORS will accept alternative back up for travel other than boarding passes (e.g. hotel receipts, conference details, written attestation and signature from PI). Boarding passes are therefore still HIGHLY RECOMMENDED in order to expedite reimbursement
5. Names of participants, date of event and purpose of event must be included for meal/entertainment reimbursements
6. If claiming per diems specific dates and meals need to be itemized; rates as follows:
  - a. Meals per diem: [Meals per Diem & Mileage Rates | UBC Finance](#)
  - b. Mileage: [Reasonable per-kilometre allowance - Canada.ca](#)
7. Unless proof of Canadian conversion (i.e. credit card bill) is provided we will use the conversion rate on the UBC financial system
8. Standard monthly connection or rental costs of telephones are non-eligible expense

## Cash Advances/Spend Authorizations

To request a travel advance please complete the travel claim form giving full details of expected expenses and/or a budget attached and send to the Finance Assistant for processing.

To reconcile a Cash Advance, an Expense Report will have to be submitted and is covered in [Create an Expense Report to Reconcile Cash Advances](#).

## Guidelines on Hiring Workers

1. Out of pocket payments to contractors and individuals is NOT recommended. Nor are honoraria as a substitute. You may not be reimbursed by UBC.
2. If you do have someone to pay as a one time fee or as a contractor, determine before paying an individual whether they are eligible to be hired at all (i.e. citizenship, landed immigrant, implied status). That is, consider implications and eligibility of hiring a worker in a foreign country: particularly their ability to receive funds from UBC (i.e. payment via cheque etc).
3. If an individual cannot be a UBC employee, complete a 'Contractor versus Employer' form before hiring an individual and include that in request for payment assuming eligibility points in assessment form (below) have been covered. <http://www.hr.ubc.ca/administrators/managing-staff/independent-contractors-vs-employees/>
4. Be aware that any payment for goods or services above \$3500 (including above contract work) requires a Purchase order to be initiated. Please allow plenty of time for processing.
5. For purchases of \$75,000 or more a competitive tender process is required.