

Travel Claim Check List

- ✓ Complete form - check off all applicable items and attachments as required
- BEFORE submitting your claim: **both** invoice AND the proof of payment is required
- OANDA rate applied when CAD paid not submitted

Student's Declaration

- My claim meets the University Allowable Travel Processes and Expense Procedure.
- My claim meets the Travel Processes and Expense Procedure, Schedule of Allowable Expenses

Student Name _____

- Trip** Conference / Event _____
- Start to End Dates _____
- No. of presentations: 0 _____
- Chair, organizer, other role: _____
- Program, agenda attached
 - Page/s your paper/name is listed: _____
 - Presubmitted estimate attached (Request to use PDA funds form)
 - Actual expenses list attached
 - other info: _____

Supervisor Name _____

- approval email of trip, expenses, funding attached

Funding

- TEA/PDA funds confirmed
- other speed codes confirmed
- grant/other resources attached

Registration

- invoice attached
- paid by PhD card
- or receipt/payment attached or shown
- statement with CAD\$ conversion rate/charges attached
- other charges, info: _____
- not required; no claim

Membership (required for conference)

- submitted with this claim, invoice and payment attached
- claim separately

Air Fare and Fees (deduct meals, internet, other charges to check separately)

- itinerary/ticket attached
- paid by PhD card or TAP
- or paid personally, explain: _____
- baggage fee(s) attached
- statement with CAD\$ conversion rate/charges attached
- comparable direct flights and fares attached
- other charges info: _____
- not required; no claim

Accommodations (submit meals, internet, other charges separately)

- reservation attached
- invoice attached
- paid by PhD card or TAP
- receipt/payment attached/shown
- statement with CAD\$ conversion rate/charges attached

Accommodations continued

- other charges info: _____
- shared with others, invoice and own payment attached
total and my share _____
- stay with family/friend _____
- other info: _____
- not required; no claim

Ground Transportation (allowable tip from 0 - 18% max)

- public transportation, total: _____
- receipts/payment attached/shown
itemize trips _____
- statement with CAD\$ conversion rate/charges for all receipts attached
- To/From destinations recorded for each receipt
- shared with others, invoice and own payment attached
total and my share _____
- receipt lost *over \$50 without original receipt must include a lost declaration form
- declaration attached
- rental car agreement and invoice attached
- payment receipt attached
- rental gas receipts attached
- statement with CAD\$ conversion rate/charges attached
- shared with others, invoice and own payment attached
total and my share _____
- mileage (own vehicle)
- To/From destinations and mileages attached _____
- not required; no claim

Meals (allowable tip from 0 - 18% max)

Meals included in fees or program cannot be claimed. Alcohol is reimbursed only when hosting* external guests.

- (preferred) claim per diems (either receipts or per diems, not both)
which days & which meals (B/L/D)? _____
- receipts with itemized food/beverage order (including room service) attached
- statement with CAD\$ conversion rate/charges for all receipts attached
- not claiming any per diems
- hosted meal: food/beverage* order, receipt and guest list attached
- other info: _____
- not required; no claim

Communication charges for university purposes

- mobile roaming charges invoice and proof of payment attached
- internet, Wifi charges and payment attached
- long distance charges and payment attached
- statement with CAD\$ conversion rate/charges attached
- other, info: _____

Date Claim Submitted to busphd@ualberta.ca: _____

PhD: Send Back / Complete