

## **Business PhD Travel Expenses** **Who Pays? How You're Reimbursed?**

Please read **BEFORE** you book, leave, or pay for anything.

*TLDR: Get approval, do not pay for anything yourself in advance, make time to read the steps below.*

1. You need:
  - a) supervisor's approval in an email sent to Helen;
  - b) purpose/reason for the trip (e.g. paper presentation, field research, job market/interviews, conference/meeting), necessary dates and city/location;
  - c) estimate of all trip-related expenses using the PhD spreadsheet at [Forms & Policies](#) on PhD website; and
  - d) how are your expenses covered, how is your trip funded? (specify if using your PhD TEA account, or supervisor's research fund, or department budget, or applying for or received travel award). If not using TEA funds, get the speed code of the fund.
2. It is recommended you complete the form *Request to Use PDA/TEA Funds* for your supervisor's approval, or create your own expense sheet. It is ideal to estimate your travel expenses/budget beforehand, to confirm how you are funded and if you are fully covered for all expenses. The form is at [Forms & Policies](#).
3. If you received a travel grant or award from FGSR, GSA, conference, or other source, forward the documentation to the PhD Office/busphd@ualberta.ca and state which trip to apply your award. (APPLY FOR GRANTS! You might be successful in getting a GSA or FGSR travel grant.)
4. Ensure you have sent your travel plan and estimate to PhD Office/busphd@ualberta.ca before you initiate purchase requests. The PhD Office must track all your approvals, conferences, expenses, travel, and funding. You can always request your TEA balance from the PhD Office.
5. For flights you must first create a [Concur](#) account. Be sure it is complete. Do not book flight on the Concur system. Maritime Travel will need to access your Concur profile to process a flight request.
6. To plan your flights contact Maritime Travel at **780-492-7000** or [ualberta@maritimetravel.ca](mailto:ualberta@maritimetravel.ca) and copy [busphd@ualberta.ca](mailto:busphd@ualberta.ca). When ready to book be sure the email with final flight selection is confirmed and copied to [busphd@ualberta.ca](mailto:busphd@ualberta.ca). Helen will check approvals and funding, then obtain a TAP number to pay for ticket (requires trip info, speed code and cost). Students cannot pay own flights with a personal credit card and expect to be reimbursed. If you want to add personal travel you may work with Maritime Travel, however costs for personal travel cannot increase the costs related to direct conference-only travel costs. Comparative quotes must be obtained and can be requested from Maritime.
7. Hotels/accommodations may be reserved with your personal card or with PhD PCard. If you are staying in a major Canadian city you must first check [HAP hotels](#) for availability and UA room rates. Contact the PhD Office if you wish for room charges (note, you pay for any other hotel charges) to go on PhD card by using the hotel's secure payment arrangement. At hotel check-in you will be asked for a personal card to cover incidental charges. At check-out ask for a **detailed invoice**, necessary for your travel claim, showing all daily room charges, fees, and payments. Consult the Allowable Expense Policy for travel charges allowed (or not allowed) for claim and reimbursement.
8. For shared accommodations (e.g. splitting the cost of an expensive conference room or sharing an Airbnb) with two or more students, it is best to split the invoice/charges and pay individually so each student has their own invoice/receipt. However, if one student pays for other student(s) then is paid back by student(s) individually, clear documentation of student names and who's paying and receiving (e.g. in cash, by

e-transfer) between payees and payers must be documented for individual reimbursements. Note, sharing/paying sometimes results in inaccurate allocation to students' TEA accounts.

9. Advance conference registrations, workshops, seminars, etc. must be paid by PhD PCard. Book an online meeting with the PhD office to arrange the payment, or visit the PhD Office in person. Please have your 'order' ready on your laptop at the payment page. The PhD Office will provide the card details which cannot be saved on laptops or the card info must be immediately deleted from student's accounts/laptop afterward. Forward the payment receipt and detailed invoice to the PhD Office/busphd@ualberta.ca.
10. Follow UA policies and directives regarding university travel:  
[Off Campus Intra-provincial & International Travel Medical Insurance](#)  
[UGo Off Campus Registry](#)  
[Claims Tips](#) by UA for Tomorrow  
also  
[Alberta Health](#)  
[Registry for Canadians Abroad](#)

In [PhD Forms Cabinet](#) find documents in Travel and Expenses section:

UA Travel Processes & Expense Procedure  
UA Schedule of Allowable Travel Expenses  
Request to Use Travel and Expense Account Funds (Excel)  
PhD Travel Claims Info (PDF)  
Travel Claim Check List (PDF)

## **WHILE** on your trip

11. Expenses incurred during travel and paid for by the student may be reimbursed if detailed receipts are kept and submitted within 21 days of return and within the fiscal year. Check the Allowable Expense Policy for details about allowances for fares, tipping, etc. Only one claim per trip is allowed.
12. There are maximums allowed for breakfast, lunch and dinner. Claiming meal per diems is preferred; you may use your meal receipts to support the per diems you want although receipts are not necessary. (Receipts must be **itemized** with all foods and beverages listed.) Reimbursement will not exceed per diem allowance. Meals on travel days are qualified by the time of departure and return home.
  - Canada or USA
    - Full day rate \$70 CAD/day or \$70 USD/day
    - Breakfast \$15, Lunch \$15 and Dinner \$30 CAD/USD
    - Incidentals \$10 CAD/USD
  - International Travel (including Hawaii)
    - Full day allowance rate \$95 CAD/day
    - Breakfast \$20, Lunch \$20 and Dinner \$45 CAD
    - Incidentals \$10 CAD
13. You cannot claim meals listed in the conference program as your conference fees include the cost of supplied meals, so you should be consuming conference foods (such as breakfast, snacks or lunch). For some conferences, dinner may be optional/separate registration fee.
14. If you are expected to host/pay for meals for guests, it should be approved in advance and as the payer you should be the most senior person in the group. Be aware of hospitality limitations and allowances for alcohol, tipping, paying, etc. You must keep a record of all who were hosted:

- names, titles, and organization, plus the detailed/itemized meal orders and payment receipt.
15. If you are sharing an expense, such as taxi, it is preferred that each person pay their own share and claim their own amount. If one person pays the full amount, they should only claim their portion. The others must provide proof that they paid their share. Separating payments ensures reimbursement is taken from the correct student's fund.
  16. Save your conference registration. Submit with the conference program, schedule and/or agenda (at least the front page with title, dates and city) and report the page number(s) if you are listed in the program (i.e. your role other than attendee/delegate/participant, such as presenter, chair, organizer, leader, poster, workshop participant, panelist, judge).
  17. Be sure your invoices are detailed and matching receipt shows method of payment, even if paid by PhD credit card. It is not acceptable to just submit a credit card receipt or a final total.
  18. **You must always make the most economical or reasonable, choices and decisions as possible when choosing/paying/sharing your expenses, and must be for school business purposes.** You must familiarize yourself with and follow the University Travel Processes and Expense Procedure and Schedule of Allowable Travel Expenses (updated June 2022 and April 2023, in [Forms and Policies.](#)) Expect expenses to be carefully scrutinized by finance reviewers to ensure claims are appropriate and meet policy allowances. You may want to add personal time to conference travel; however costs cannot be higher due to personal needs. Proof (such as flight cost differences) may be required to show your due diligence. If you have any special circumstances please discuss with your supervisor or PhD Office and obtain written approval BEFORE incurring any expenses, to be sure you are covered.
  19. Tipping is discretionary but should range from 0% to 15%. Tips over 18% cannot be reimbursed.
  20. If you are claiming mileage, you cannot also claim for gas. Gas claims are for rental vehicles.

## **UPON RETURN - GET READY TO SUBMIT FOR REIMBURSEMENT**

21. Complete a Travel Claim Checklist. You must ✓ check off and attach all supporting documents. Incomplete submissions will not be accepted and returned to the student. Boarding passes are no longer required for claims. Remember: supervisor approval, speed code, agendas, presentation listings, invoices, receipts, card statements, grant funding, everything applicable. Email all documents to [busphd@ualberta.ca](mailto:busphd@ualberta.ca) (do not hand in print outs or paper receipts – scan them please!).
22. For your first claim, you will receive an email to authorize Helen (helen7) and Debbie (gi1) to be a “designated entry authority” in the financial system. Instructions to do this which will take you about 2 minutes.
23. If you have credit card or bank statements showing foreign currency conversions, submit them so you are reimbursed for the exact amount you were charged. Without documentation, the U of A financial system will automatically calculate an averaged currency exchange. We do not require statements as proof of payment in Canadian dollars unless your receipt does not verify that payment was received.
24. If you applied for and/or won/received a travel grant/award (GSA, FGSR, conference, external supporter, you must share the documentation with the PhD office and include it in your travel claim.
25. **Claims should be submitted within 21 days of your return from a trip or from date of purchase**, and within the fiscal year it is spent (April 1 – March 31). Expenses not submitted within the proper fiscal period are subject to approval and may not be reimbursable. Only one claim per trip is accepted.
26. Students are responsible for overspending, insufficient funding, or unapproved/unexplained expenses.

*If you have any questions please stop by or email the PhD Office*

*Helen or Debbie will answer them for you!*  
*It will save delays, solve problems, or help clear up errors and confusion that might affect your claim.*  
*We Appreciate It and Thank You!*