

DEPARTMENT OF HISTORY - TRAVEL POLICY

The University of Western Ontario reimburses for necessary and reasonable travel expenses incurred while conducting University business. Individuals should not benefit financially, nor incur financial losses, as a result of travelling on behalf of the University.

Travellers may use personal loyalty program points, credits, or discounts towards travel related expenses and upgrades for university business travel but only the out of pocket fees and taxes associated with travel will be reimbursed. The University will not reimburse for the “equivalent” of any loyalty program points, credits, or discounts used.

SSHRC’s policy on financial responsibilities and accountability states:

Each institution establishes appropriate procedures, systems and controls to ensure that Agency policies and requirements are followed. The institution has the right and responsibility to withhold and withdraw approval of expenditures proposed by a grantee that contravene the Agency's requirements or the institution's policies and, when appropriate, to seek advice or ruling from the Agency as to eligibility of expenses.

Administrative, personnel and accounting procedures must conform to the standards, practices and policies of the grantee's institution.

https://www.nserc-crsng.gc.ca/InterAgency-Interorganismes/TAFA-AFTO/index_eng.asp

ALL REIMBURSEMENT REQUESTS MUST BE RECEIVED BY FINANCIAL SERVICES **NO LATER THAN SIXTY (60) DAYS** AFTER THE DATE OF COMPLETION OF THE TRAVEL AND/OR DATE OF INCURRED EXPENSE

RESEARCH FUNDS - ONE CLAIM PER TRIP

MINIMUM INFORMATION/DOCUMENTATION REQUIRED

BUSINESS PURPOSE

1. Who travelled or attended the event or activity
2. Business relationship of all attendees included in the claim
 - In the case of research, the claimant’s working relationship with the Principal Investigator (PI)
3. What type of event, activity or purchase took place (attach conference or event prospectus, itinerary)
4. Where the event or activity took place or purchase was made
5. Why the expenses were incurred as related to University business

RECEIPTS

1. Original itemized receipts (copies of e-ticket receipts acceptable) showing proof of payment.
2. When only flight/rail is to be claimed, boarding passes are required.

TRANSPORTATION

Western will reimburse up to the most economical means of travel between air, rail, and vehicle. When travelers prefer to travel by a more expensive mode of transportation, the most economical that provides the greatest value for money will be reimbursed.

Airfare – Economy Class Only*

Original Invoice and Travel Itinerary must be submitted. Trip cancellation insurance is recommended.

*Business class for documented medical reasons (long haul flights, outside of North America) requires prior approval from the Dean; lowest-priced, non-stop business class airfare, if funds are available and allowable by the funding source.

Rail, Bus, Taxi – Most Economical Rate**

Original ticket stub or equivalent, including detailed cost information

**15% discount; VIA 1 acceptable

<https://www.viarail.ca/en/fares-and-packages/business-travel/corporate-fares/western>

Vehicle Rentals – More Economical (One Day Travel) than Public/Private Transportation

Current Supplier – Enterprise Rent-A-Car (Local); Western Corporate Insurance – Registration Required.

<https://www.uwo.ca/hr/safety/insurance/rentals.html#University%20Corporate%20Insurance>

Mileage – Rates in accordance with Treasury Board of Canada Travel Directive

Should be limited to travel when no suitable public transportation is available. Attach a print out of an online mapping tool showing distance travelled. Note: it is relatively expensive to use a private vehicle for long distance travel to places like Toronto or Detroit or further. If using personal car, reimbursement will be at the lower of either the Treasury Board rate or the cost of a car rental plus gas (quote or receipts required).

[Appendix B - Kilometric Rates - Modules 1, 2 and 3 \(njc-cnm.gc.ca\)](#)

**Rates reviewed and adjusted throughout the year (January 1, April 1, July 1, October 1)*

ACCOMMODATIONS

Western and CAUBO negotiated hotel rates may be found at:

https://www.uwo.ca/finance/procurement/preparing_to_travel/index.html

Preferred hotels with negotiated discounts must be used wherever possible to take advantage of negotiated discounts. For domestic travel, preapproval by Chair is required if hotel cost exceeds CAUBO rate.

When travelling internationally, include justification for the hotel rate chosen (include a screen shot of similar hotel rates in the area at time of booking). **Preapproval by Chair is required if hotel cost exceeds \$300 CDN pre-tax.** When travellers prefer to stay at a more expensive hotel, the value of most economical feasible choice will be reimbursed.

When a hotel stay before or after a flight is required, and personal vehicle is used, consider hotel rates that include parking.

Hotel – Standard Room, Single Occupancy Only

Detailed information required (dates, type of room, rate, total costs and method of payment).

On-line Bookings – detailed hotel reservation confirmation can be provided only if no detailed receipt was provided on check out. Proof of payment also required (ie: credit card statement).

Private, Non-Commercial – Rates in Accordance with Treasury Board of Canada Travel Directive
Include the person’s name and address – No receipts required.

MEALS

Employees will be reimbursed for meals that are substantiated with a business purpose.

Individuals have the option of claiming meal allowances (no receipts are required)



RATES for travel 1-30 days (different rates for longer stays)

MEAL PERIOD	TRAVEL IN CANADA	TRAVEL IN THE USA	TRAVEL OUTSIDE NA*
BREAKFAST	\$15 CAD	\$15 USD	\$17 CAD
LUNCH	\$20 CAD	\$20 USD	\$28 CAD
DINNER	\$30 CAD	\$30 USD	\$40 CAD
DAILY MAXIMUM	\$65 CAD	\$65 USD	\$85 CAD

or

Reimbursement of actual meal costs (with itemized receipts) up to a maximum of the Treasury Board Meal rates. Credit/debit card receipts, credit card statements are not acceptable in place of receipts.

**Rates reviewed and adjusted throughout the year (January 1, April 1, July 1, October 1)*

<https://www.njc-cnm.gc.ca/directive/d10/v238/s659/sv18/en>

IMPORTANT NOTES

On externally funded research grants, alcohol is not eligible for reimbursements.

Meals supplied by host organizations, conferences etc., or supplied by the airline are not eligible for reimbursement.

TRAVEL AND EXPENSES – POLICIES AND PROCEDURES

https://www.uwo.ca/univsec/pdf/policies_procedures/section2/mapp216_procedure.pdf

PRIOR APPROVALS

1. If the travel combines both personal travel days and business travel days, the University will only reimburse the traveler for accommodation and meal expenses incurred on business days. These travel arrangements must be pre-approved by the Claimant’s supervisor.
2. Individuals travelling on a long-haul flight (outside of North America) may book the lowest-priced, non-stop business class airfare, if funds are available and where allowable by the funding source. Approval must be obtained prior to travel by the traveler’s Dean, AVP, VP or Vice-Provost.

EQUIPMENT AND SUPPLIES

Equipment (computer, laptop, printer) <https://ssts.uwo.ca/support/hardware.html> and supplies (paper submission fees, subscriptions, books) should be purchased from preferred Western suppliers (where applicable) using a speed code, ordering through Mustang Market, or using the Department credit card (see Heidi Van Galen).