

**The UNIVERSITY of WESTERN ONTARIO
TRAVEL POLICY SUPPLEMENT AS RELATED TO RESEARCH**

The purpose of this document is to compare and contrast university requirements and eligibility of expenses to that of major granting agencies.
When determining which policy/guideline to use, the more stringent of them will apply.

	The University of Western Ontario Travel and Expense Reimbursement Policy 2.16	Tri-Agencies CIHR/NSERC/SSHRC, Canada Research Chairs (CRC), Networks of Centres of Excellence (NCE)	Treasury Board of Canada, Public Works and Government Services Canada (PWGSC), Global Affairs Canada, AUCC	Provincially funded programs	US Government Funded Projects (NIH, US Army, NASA, etc.)
INFORMATION					
Travel destination	City and Country				
Dates	Departure date to Return date				
Purpose of Trip	<ul style="list-style-type: none"> Indicate the nature of the trip (i.e. name of conference, workshop or meeting) 	<ul style="list-style-type: none"> Indicate the relationship between the trip and the research project (i.e. name of conference, workshop or meeting) If the claimant is not the Principle Investigator (PI), specify the relationship to the PI (i.e. student, PDF, visiting scientist, collaborator, etc.) Indicate the person or institution visited A separate claim must be submitted for each trip. If additional receipts for a particular trip are submitted subsequent to the original claim, please reference the original claim number on the second claim. 	Same as Tri-Agencies	Same as Tri-Agencies	<ul style="list-style-type: none"> Indicate the nature of the trip (i.e. name of conference, workshop or meeting)
TRANSPORTATION					
Air Travel	<ul style="list-style-type: none"> See Travel and Expense 	<ul style="list-style-type: none"> Most economical rate Original invoice and boarding passes must 	<ul style="list-style-type: none"> Most economical rate Original invoice and boarding passes must be 	<ul style="list-style-type: none"> Most economical rate Original invoice and boarding passes 	<ul style="list-style-type: none"> Travelers must comply with the requirements of the Fly America Act which generally requires that air travel

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	Reimbursement Procedure 20.01. <ul style="list-style-type: none"> Original invoice and boarding passes must be submitted. When electronic boarding passes are used please note this on the claim. 	be submitted. When electronic boarding passes are used please note this on the claim.	submitted. When electronic boarding passes are used please note this on the claim.	must be submitted. When electronic boarding passes are used please note this on the claim.	funded by US Federal funds be conducted on a US flag carrier. See the Grants Policy Statement (GPS), section 7.9 https://grants.nih.gov/grants/policy/nihgps/nihgps.pdf <ul style="list-style-type: none"> The US flag carrier's lowest airfare must be used; travelers are strongly encouraged to book travel in advance to obtain discounted fares.
Airfare – insurance related to travel	<ul style="list-style-type: none"> Trip cancellation insurance is recommended. The combined non-medical travel insurance is eligible if it is the most cost effective way to purchase the cancellation insurance. Medical insurance is not eligible 	Travel medical insurance is eligible for research personnel who do not receive any such benefits from their institution and/or other sources.	Not eligible	Travel medical insurance is eligible for travel outside Canada for research personnel who do not receive any such benefits from their institution and/or other sources.	
Rail, Bus, Taxi	<ul style="list-style-type: none"> Original ticket stub or equivalent, including detailed cost information is required See Travel and Expense Reimbursement 	<ul style="list-style-type: none"> Original ticket stub or equivalent, including detailed cost information is required Most economical rate 	Same as Tri-Agencies	Same as Tri-Agencies	<ul style="list-style-type: none"> The lowest fare available must be used.

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	Procedures 20.05 and 20.09				
Use of Claimant's Owned Vehicle	<ul style="list-style-type: none"> Reimbursement is on a per kilometer basis only. Rates other than that published in the Travel Procedure, clause 20.06, will not be paid. 	Same as Western	Rates can be obtained from the Treasury Board website, http://www.njc-cnm.gc.ca/directive/d10/v238/s658/en	Same as Western	<ul style="list-style-type: none"> Mileage reimbursement not to exceed GSA approved rates. https://www.gsa.gov/portal/content/100715
ACCOMODATION					
Hotel	<ul style="list-style-type: none"> If booked on-line, detailed hotel reservation is acceptable only if no detailed receipt provided on check out. Detailed reservation must indicate dates, type of room, rate, total cost and method of payment. 				<ul style="list-style-type: none"> Not to exceed GSA approved rates (US) and State Department rates (non-US) https://aoprals.state.gov/web920/per_diem.asp https://www.gsa.gov/portal/content/104877
Private, non-commercial	<ul style="list-style-type: none"> Refer to Treasury Board directive, Appendix C, 1.1 Western does not pay the host directly 	Same as Western	<ul style="list-style-type: none"> Refer to Treasury Board directive, Appendix C, 1.1: http://www.njc-cnm.gc.ca/directive/d10/v238/s659/en#s659-tc-tm 	<ul style="list-style-type: none"> \$30 CDN per night Written explanation must be submitted describing the purpose of trip, name of host and number of days. 	
MEALS & HOSPITALITY					
Meals	<ul style="list-style-type: none"> Original, detailed receipt is required. Credit/debit card 	<ul style="list-style-type: none"> Receipt requirements are the same as Western's. 	<ul style="list-style-type: none"> Receipt requirements are the same as Western's. 	<ul style="list-style-type: none"> Receipt requirements are the same as Western's. 	<ul style="list-style-type: none"> Not to exceed GSA approved rates (US) and State Department rates (non-US) Alcohol is <u>not</u> eligible

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	<ul style="list-style-type: none"> slips are not acceptable. Maximums apply per meal, see Travel Procedure 14.02 Alcohol is eligible, if reasonable 	<ul style="list-style-type: none"> Maximums apply per meal, see Travel Procedure 14.02 Alcohol is <u>not</u> eligible. 	<ul style="list-style-type: none"> Maximums apply per meal, see Travel Procedure 14.02 Alcohol is <u>not</u> eligible. 	<ul style="list-style-type: none"> Maximums apply per meal, see Travel Procedure 14.02 Alcohol is <u>not</u> eligible. 	https://aoprals.state.gov/web920/per_diem.asp https://www.gsa.gov/portal/content/104877
Entertainment of Others	<ul style="list-style-type: none"> Original, detailed receipt must be accompanied by sufficient detail to identify the person or persons entertained, including names, university or organization. 	<ul style="list-style-type: none"> Eligible for networking and research related activities between grantee and guest researchers, external partners and/or stakeholders. Must state the date and purpose of the event, names and number of attendees Alcohol is <u>not</u> eligible 	Same as Western	Same as Western	<ul style="list-style-type: none"> Not eligible
Meal Per Diem – without receipts	Maximum allowable rates for each meal are available at http://www.uwo.ca/finance/accounting/travel_expense_reimbursement.html	Same as Western	Rates can be obtained from the Treasury Board website, http://www.njc-cnm.gc.ca/directive/d10/v238/s659/en	Same as Western	Not reimbursable
MISCELLANEOUS					
Conference Prospectus/Program	Not required	<ul style="list-style-type: none"> Must include dates of conference/workshop, breakdown of 	Same as Tri-Agencies	Same as Tri-Agencies	<ul style="list-style-type: none"> Must include dates of conference or workshop and breakdown of fees

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		conference fees (i.e. meals, events, etc.)			
Advances	Funds received in advance of the travel/event occurring must be cleared by submitting a Travel/Expense claim within sixty (60) days following the completion of the travel/event or prior to the end date of the research project, whichever is sooner.				
Paperwork	Claims with itemized receipts should be sent to the travel desk within fifteen (15) days from approval of the claim. Future reimbursements may be withheld if receipts are not received within the specified time period.				

REFERENCES - WEBSITES	
University Travel Policy, 2.16	http://www.uwo.ca/univsec/mapp/section2/mapp216.pdf
Travel Procedures	See link in Travel Policy 2.16 document
Tri-Agencies (CIHR, NSERC, SSHRC)	Financial Administration Guide: http://www.nserc-crsng.gc.ca/Professors-Professeurs/FinancialAdminGuide-GuideAdminFinancier/index_eng.asp Use of Grant Funds: http://www.nserc-crsng.gc.ca/Professors-Professeurs/FinancialAdminGuide-GuideAdminFinancier/FundsUse-UtilisationSubventions_eng.asp Supporting Documentation: http://www.nserc-crsng.gc.ca/Professors-Professeurs/FinancialAdminGuide-GuideAdminFinancier/Reporting-Rapports_eng.asp
Treasury Board of Canada	http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tbm_113/menu-travel-voyage-eng.asp
Ontario Travel Directives	https://www.ontario.ca/document/travel-meal-and-hospitality-expenses-directive
NIH Grants Policy Statement	https://grants.nih.gov/grants/policy/nihgps/nihgps.pdf

Notes:

- 1) All travel/expense claims applied to research accounts must have a one-over approval. This approval cannot be delegated and must be from the individual to whom the claimant reports.
- 2) If any portion of the claim is not within policy, procedure or guidelines, an explanation must be provided as to the extenuating circumstances and approved by the appropriate authority.
- 3) This document is for reference only. Please refer to Travel Policy 2.16 for complete details of Western's requirements.