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-Council CIHR/NSERC/SSHRC, Canada Research Chairs (CRC), Networks of Centres of Excellence (NCE)	Treasury Board of Canada, Public Works and Government Services Canada (PWGSC), CIDA, AUCC	Provincially funded programs
INFORMATION				
Travel destination	City and Country			
Dates	Departure date to Return date			
Purpose of Trip	Indicate the nature of the trip (i.e. name of conference, workshop or meeting)	• 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-Council	Same as Tri-Council
TRANSPORTATION				
Air Travel	• See Travel and	• Economy class only	• Economy class only	• Economy class only

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	Expense Reimbursement Procedure 20.01. • Original invoice and boarding passes must be submitted. When electronic boarding passes are used please note this on the claim.	• Original invoice and boarding passes must be submitted. When electronic boarding passes are used please note this on the claim.	• Original invoice and boarding passes must be submitted. When electronic boarding passes are used please note this on the claim.	• Original invoice and boarding passes must be submitted. When electronic boarding passes are used please note this on the claim.
Airfare – insurance related to travel	• 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. • Trip cancellation insurance is eligible	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	• Original ticket stub or equivalent, including detailed cost information is required • See Travel and Expense Reimbursement Procedures 20.05 and	• Original ticket stub or equivalent, including detailed cost information is required • Most economical rate	Same as Tri-Council	Same as Tri-Council

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	20.09			
Use of Claimant's Owned Vehicle	• 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/travel-voyage/s-td-dv-a2-eng.php	Same as Western
ACCOMODATION				
Hotel	• 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.			
Private, non-commercial	• Refer to Treasury Board directive, Appendix C, 1.1 • Western does not pay the host directly	Same as Western	• Refer to Treasury Board directive, Appendix C, 1.1	• $30 CDN per night • Written explanation must be submitted describing the purpose of trip, name of host and number of days.
MEALS & HOSPITALITY				
Meals	• Original, detailed receipt is required. Credit/debit card slips are not acceptable. • Maximums apply per meal, see Travel Procedure 14.02 • Alcohol is eligible, if nominal or moderate	• Receipt requirements are the same as Western's. • Maximums apply per meal, see Travel Procedure 14.02 • Alcohol is <u>not</u> eligible.	• Receipt requirements are the same as Western's. • Maximums apply per meal, see Travel Procedure 14.02 • Alcohol is <u>not</u> eligible.	• Receipt requirements are the same as Western's. • Maximums apply per meal, see Travel Procedure 14.02 • Alcohol is <u>not</u> eligible.
Entertainment of Others	• Original, detailed	• Eligible for networking	Same as Western	Same as Western

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	receipt must be accompanied by sufficient detail to identify the person or persons entertained, including names, university or organization.	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 not eligible		
Meal Per Diem – without receipts	Not reimbursable	Same as Western	Total meal allowance is $70.25 CDN per day for travel in Canada and US. Individual meal rates are as follows: • Breakfast $15.35 • Lunch $14.60 • Dinner $40.30 Refer to the Treasury Board website for international rates.	Same as Western
MISCELLANEOUS				
Conference Prospectus/Program	Not required	• Must include dates of conference/workshop, breakdown of conference fees (i.e. meals, events, etc.)	Same as Tri-Council	Same as Tri-Council
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,			

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	whichever is sooner.			
Paperwork	Claims with itemized receipts should be sent to Financial Services 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-Council (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	http://www.mgs.gov.on.ca/stdprodconsume/groups/content/@mgs/@home/documents/resourcelist/276507.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.