



Finance Overview: Travel Expenses

To submit a claim for travel-related expenses, complete the [Travel Expense Summary](#) and submit online via the [Expense Reimbursement website](#) with detailed, itemized receipts and supporting documentation. Each Travel Expense submission must contain only one claim. Two separate trips cannot be included in one submission.

When completing the Travel Expense Summary, in Section 3: Claim details, there are 3 options to select from:

- **Travel Advance**
Select this option to be reimbursed for any expenses have been paid in advance of the travel (such as conference registration or flights). Enter the descriptions and amounts in Section 7: Other Expenses.
- **Final - Advance Received**
Select this option upon completion of the travel. In Section 3: Claim details, enter the amount that was reimbursed in advance. Complete Section 6: Meals (if applicable) and Section 7: Other Expenses. Include all new expenses that have not yet been reimbursed for and all amounts that were reimbursed in advance. The total amount reimbursable will be reduced by the amount paid in advance.
- **Final - No Advance Received**
If no expenses were submitted prior to the travel, select this option and complete Section 6: Meals (if applicable) and Section 7: Other Expenses with all expenses incurred.

Conference Attendance

All claims for courses or conferences must include proof of completion. If a certificate of completion/attendance is not provided, please provide an email from the organizer of the event to confirm completion or attendance.

In Section 3: Claim Details of the Travel Expense Summary, if the Purpose selected is Conference, there are 2 options to select from:

- **Requested By - Employer (No Form Required)**
This option means that the employer/supervisor requested that the payee attend the conference.
- **Requested By - Employee (Application Form Required)**
If the payee has requested to attend the conference, the [Application For Conference](#)

[Attendance and Funding](#) will be required. Please see the section below for more information regarding forms.

Additional Forms

In addition to the Travel Expense Summary, required forms may include:

- [Application For Conference Attendance and Funding](#)
Required when the employee has requested to attend a conference.
(Not required for OPSEU Unit 1)
- [Travel Authorization - Outside of Canada](#)
Required when traveling outside of Canada. (Not required for OPSEU Unit 1)
- [Employee Skill and Professional Development Application Form](#)
Required when using Whole-School Professional Development funding. If you are requesting to access Professional Development funds, contact your supervisor. The form must be signed by the employee, their supervisor, and Human Resources. As the Whole-School PD cost centres are Portfolio (not Unit) codes, the claim must be approved by the budget holder of the portfolio cost centre.

Meals

- You may claim a per diem meal allowance when you are on NOSM University business and a meal is not otherwise being provided. (such as continental breakfast, meals provided as part of a conference or meeting). No per diem amounts should be claimed for meals at home prior to departure or upon return.
- Receipts for meals are not required to be submitted or retained.
- Claimants are expected to pay for their own meals and cannot claim per diem amounts for other individuals.
- Meal per diems are reimbursed at the following rates:
Breakfast: \$17 Lunch: \$17 Dinner: \$31

Group Meals and Hospitality

- Group meals or hospitality expenses should be claimed separately on a Cheque Requisition and not included on an individual's travel expense claim.



- If the individual approving the expense is present at the meal, an additional approval for the claim must be obtained from the supervisor of the most senior person in attendance at the meal.
- For hospitality events where alcohol will be served, prior written approval is required from either the President or the Chair of the Board.
- Claims for reimbursement of hospitality or business related meals must include:
 - A brief description of the purpose of the activities and justification
 - An itemized receipt
 - A list of attendees including: names, position titles & employers, and reason for their attendances

Receipt Requirements

Receipts must be detailed, itemized, and show proof of payment. For hotels, flights, and car rentals, booking confirmations or estimates are not sufficient. Finance requires a final invoice showing proof of payment. If a final invoice cannot be provided, the claim will require a copy of the booking confirmation or estimate and credit card statement to provide proof of payment.

Method of Payment

Individuals should use standard forms of payment (ie: cash, credit card, or debit card) for NOSM University-related expenses that will be submitted for reimbursement. Loyalty or reward points should not be used for payment. Likewise, personal loyalty or rewards accounts must not be used for organizational expenses or bookings (ie: applying a personal hotel rewards account to a group booking to accumulate points).

Preferred Rates

When booking hotels and car rentals, NOSM University preferred hotels should be booked whenever possible using the NOSM U rates. Information is available on the Procurement SharePoint page. When the preferred vendors and/or rates are not used, please include an explanation with the claim.

If a NOSM University preferred rate is not available, a CAUBO discount may be an option. NOSM University is a member of CAUBO (Canadian Association of University Business

Officers), and all Staff and Faculty are eligible to [sign up for a free membership](#) that entitles them to [discounts when booking](#) travel such as hotel stays, car rentals, and UP Express.

Vehicles

When traveling via vehicle, the claim submission should include:

- **Mileage at \$0.42/km**

If driving a personal vehicle, the claim should include mileage only. Fuel receipts will not be reimbursed. For mileage, use the Kilometre Matrix of Tab 2 of the Travel Expense Summary. If the communities are not listed, provide a Google Map showing the distance traveled. When two or more individuals are travelling together, only the driver shall claim mileage for the trip.

- **Rental vehicle receipt and fuel**

If renting a vehicle, the claim should include the rental vehicle receipt and any receipts for fuel purchased for the rental vehicle.

Proof of Travel

Proof of travel is required for all travel claims. Acceptable proof of travel includes one of the following:

- Boarding passes
- Hotel or accommodations statements
- Conference attendance confirmation
- Incidental receipts from the destination (ie: Gas or meal receipts)

If a receipt or other proof of travel cannot be included with the claim, the reviewer or approver must verify that the travel occurred by adding a note to the claim in Perceptive Content before routing it to Finance.

The confirmation note must clearly state that the travel took place (ie: "I can confirm that the travel occurred."). Note that for learner travel claims, statements which only confirm the rotation or placement was scheduled (ie: "Confirmed in PaNDa.") are not sufficient.

Private Accommodations

If staying with family or friends while traveling, a gift of up to \$30 per day can be provided to the host and claimed for reimbursement. The following must be provided in the claim:

- Explanation with the purpose of the trip, identifying the host and number of days stayed, and

- Written confirmation or invoice from the host, and
- Proof of payment (ie: copy of e-transfer). If paid in cash, receipt of cash must be specified in writing by the host.

Foreign Currency Conversion

If traveling outside of Canada, Finance will require the conversion to CAD for any expenses that were paid in foreign currency. In addition to itemized receipts, the claim must also include one of the following:

- A credit card statement showing the transaction(s) converted to Canadian currency
- The daily exchange rate from the [Bank of Canada](#) showing the date of the transaction(s).

Travel Service Provider

NOSM University staff and faculty are encouraged to take advantage of our travel provider, NARAT Incorporated. NARAT can be used to book flights, hotels, and car rentals. Note that NARAT will also manage airline credits to be used for future travel. NOSM University staff and faculty can book travel via email or phone. A credit card is required at the time of booking.

- NARAT: 416-850-9928
- Renata Snidr: 416-850-9928 ext. 111
- Email: LPC_travels@narat.org (or travel@nosm.ca)
- 24-hour emergency call centre: 416-495-1555

Note that NOSM University learners can also book travel by emailing LPC_travels@narat.org (or travel@nosm.ca) details of the travel request and include the name of the NOSM Coordinator/Approver.

Related Policies

- [Travel Management and General Expenses Policy](#)
- [Hospitality for Business Related Meals and Expenses Policy](#)