Travel Expense Claims and Travel Advances & Clearances

Travel Advances and Clearances

Travel advance is a money issued in advance of actual travel and must be made no more than 10 business days prior to the start of the trip. It is intended for the purpose of paying for local expenses during travel, where cash is the only accepted payment method. A travel advance should not be used to purchase airline tickets, or when pre-booking any other travel related expenses such as conference registration fees and accommodation.

A travel advance can be issued only to UBC faculty, staff, and students. If the advance is issued to a student, the approving faculty member is responsible for ensuring that the travel advance is cleared after the end of the trip. Travel advances are only issued in Canadian dollars.

A travel advance can be made out for only one trip at a time, and a traveller cannot have more than one outstanding travel advance. A new travel advance will not be granted until the previous outstanding travel advance has been cleared.

Travel advance clearance is a travel claim that settles a previous advance. The travel clearance must be submitted within 30 days after the end of the trip.

Pre-travel planning

- **Booking Airfare**: If the flight does not depart/return to Vancouver due to personal reasons, or if there is an additional part to the trip due to personal reasons, a quote for a direct lowest economy flight must be provided; lower of quote and actual invoice will be reimbursed
- **Airfare**: must be purchased at the lowest economy rate (boarding passes are not required unless clearing a prepaid expense)

Instructions for completing the forms (travel claim and travel advance)

Use for travel (fieldwork/conferences/workshops/meetings) purposes only. Zoology reimbursement forms are available on the zoology website at [http://www.zoology.ubc.ca/forms/](http://www.zoology.ubc.ca/forms/)

- One travel claim per trip; multiple trips should not be combined
- Complete all the highlighted in orange sections on the Treq form (Page 1 & 2)
- **For travel advances** complete highlighted in orange sections on the Travel Advance Form  Page 1 & all fields on Page 2
  - **Payee**: must be full legal name
  - **Address**: employees and student should use work/business address
  - **Amount**: enter the total amount to be reimbursed.
  - **Purpose of trip**: enter justification for the trip (use 2nd page to provide additional information)
  - **Destination**: enter the trip destination
  - **Duration of Trip**: enter start and end date of the trip
  - **Signature**: sign the reimbursement as the traveler
  - **PI Authorization**: PI to provide the approval signature
  - **Per-diem claims and rates**
Per-diem is the preferred method of reimbursement for out of town meal expenses. Complete the per diem section on 2nd Page only when per diem is claimed

Per Diem rates are:

<table>
<thead>
<tr>
<th></th>
<th>Canada</th>
<th>USA</th>
<th>Europe/Int'l</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>$14 CAD</td>
<td>$14 USD</td>
<td>$14 EURO / USD /CAD</td>
</tr>
<tr>
<td>Lunch</td>
<td>$16 CAD</td>
<td>$16 USD</td>
<td>$16 EURO / USD /CAD</td>
</tr>
<tr>
<td>Dinner</td>
<td>$30 CAD</td>
<td>$30 USD</td>
<td>$30 EURO / USD /CAD</td>
</tr>
<tr>
<td>Daily Total</td>
<td>$60 CAD</td>
<td>$60 USD</td>
<td>$60 EURO / USD /CAD</td>
</tr>
</tbody>
</table>

- **Mileage claims and rates**
  Only for use of personal vehicle. Mileage rate: $0.49/km (submit Google Maps of the trip - exclude any BC Ferries distances).
  Gas expenses are not eligible for reimbursement when using personal vehicle (only applicable for departmental or lab vehicles and car rental)

**Supporting Documentation Requirements**

- Original and itemized sales receipts required (photocopies and pictures not allowed)
  - E-mailed receipts are acceptable, but they must provide detailed description of items purchased
- Sales receipts must be taped single-sided on blank copy paper (include description for each receipt or a summary sheet) and numbered
- If paying for other UBC or NON-UBC individuals during a trip, provide their names and affiliation to UBC + the employee or student ID when applicable. Also, provide additional information on why they joined you on the trip and how they contributed to your research (label next to the receipt)
- If meals were provided at the conference, cannot claim per-diem for those meals.
- If attending a conference or seminar, the program itinerary MUST be included when submitting the claim
- Foreign currency conversion - provide copy of bank statement or use www.oanda.com
  - Bank statement must contain Payee’s name or bank account number to be valid (copy and paste (edited) statements will not be accepted)
- For travel advance clearing, please provide the receipt summary sheet

For more information, please contact the Zoology Finance team:
Phone: 604-822-4265 | Email: finance@zoology.ubc.ca or finclerk@zoology.ubc.ca