

## Conference Funding & Reimbursement

The purpose of this document is to outline eligibility requirements and processes, and to assist claimants in determining the reasonableness and appropriateness of commonly incurred conference related expenses such as registration fees, travel, accommodations, meal allowances, combined personal and business travel, and cancellations. All reimbursable expenses should be moderate and are subject to pre-approvals. In instances not covered by these guidelines, or when deviation is required, additional approval from the DoM must be obtained.

### Conference Funding

- All requests for funding to attend a conference must be submitted to and approved by the designated signing authority prior to booking.
- Approvals should be received in writing.
- Funding amounts vary based on the Division and Conference, and should be clarified in writing prior to booking.

### Registration Fees

- Early registration is required. Only with pre-approval under extreme circumstances will late registration fees be acceptable.
- Original receipts and confirmation of registration and attendance (i.e. name tag) must be provided for reimbursement.

### Air & Rail Travel

- The least expensive economy class ticket is to be booked as far in advance of departure as possible to ensure the best possible rate is obtained.
- Tickets should be booked departing from and arriving to Toronto airports and stations; departures from and arrivals to locations outside of Toronto will require pre-approval (i.e. including a price comparison from Toronto).
- Seat upgrades are typically not eligible for reimbursement.
  - If a first/business or premium economy class ticket is purchased, only the cost of the least expensive economy class ticket will be reimbursed. An airfare quote / printout for the economy class, taken on the same day as the first class ticket was booked, should be provided.
  - A deviation from this requires Decanal approval.

- Additional costs incurred for seat selection will not be reimbursed, unless necessary for authorized travel and is pre-approved.
  - When submitting the request for reimbursement, the documentation for the pre-approval including the justification should be included.
- Additional costs incurred for extra baggage (beyond one (1) checked baggage item) will not be reimbursed, unless necessary for authorized travel and is pre-approved.
  - A maximum of two (2) pieces of checked baggage are eligible for reimbursement when the claimant is transporting University materials or when the extended period of travel necessitates excess personal baggage.
  - Excess baggage charges (more than two (2) pieces), or oversized/overweight) is only reimbursable if Decanal approval is received.

## Additional Travel

- It is recommended that a personally owned vehicle be used only for short journeys where this constitutes the most economical means of transportation or where no suitable public transportation is available.
  - The standard is that a personally owned vehicle may be used for trips up to 500 km in round trip length. For longer trips a traveler may elect to use his or her own vehicle, but reimbursement for kilometrage will be limited to the equivalent least expensive mode of transportation to and from that destination.
  - All kilometrage travelled in a personal vehicle when conducting business (subject to the 500 km limit mentioned above) will be reimbursed on a cents per kilometre basis. The rates are reviewed and adjusted from time to time. The current rates can be found [here](#).<sup>1</sup>
- Information regarding the use of a rental vehicle can be found [here](#).
- Moderate costs incurred traveling between the airport, train station, hotel and/or conference will be covered.
- Shared taxis are encouraged whenever possible.
- Original receipts must be provided for reimbursement.

## Accommodations

- Depending on the location of the conference, accommodation costs will vary. You must book the preferred hotel / hotel rate being offered. Any deviation requires approval.

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<sup>1</sup> <http://finance.utoronto.ca/policies/gtfm/travel-and-other-reimbursable-expenses/travel-and-other-reimbursable-expenses-policies-and-guidelines/#employeevehicle>.

- The DoM will only reimburse for dates associated with the conference.
- If traveling with a partner or companion, the amount to be claimed should only be the most economical room rate for a single occupant – any excess room charges to accommodate the partner or companion will not be reimbursed.
- Original receipts must be provided for reimbursement. The original receipt is the detailed statement of guest charges from the host establishment. If the accommodation is booked through a third party booking site (like Expedia), then the order confirmation from the third party booking site showing credit card payment and travel dates, including a statement of guest charges or hotel bill with travel dates from the host establishment for other charges (or a hotel bill with travel dates where there were no other charges, if provided) should accompany the reimbursement request.
- For information regarding accommodations with friends and relatives, review the [University of Toronto’s Travel and Other Reimbursable Expenses – Policies and Guidelines](#).

### Meal Allowance

- The maximum per diem rate (\$55 per day) found on the personal expense reimbursement form is not eligible for reimbursement, unless expenses are funded by an external agency (excluding agencies or ministries of the Government of Ontario).<sup>2</sup>
- Meals that are provided by the conference are not eligible for reimbursement (i.e. breakfast is being offered as per the conference agenda, breakfast from elsewhere will not be eligible for reimbursement).
- In cases where meals are not offered at the conference, the maximum amounts below are eligible for reimbursement (with supporting receipts):

Meal	In Canada	USA or International
Breakfast	\$11.00 CAD	\$15.00 CAD
Lunch	\$17.00 CAD	\$22.50 CAD
Dinner	\$27.00 CAD	\$37.50 CAD
<i>*the above prices are inclusive of tax and gratuity.</i>		

- Meal costs exceeding the maximum amounts eligible for reimbursement must be covered by the claimant.
- Alcoholic beverages are not eligible for reimbursement.
- Please request an itemized receipt with all meals.

<sup>2</sup> Meal per diems are non-reimbursement where the expense is funded by an agency or ministry of the Government of Ontario (i.e. operational accounts, research funds from Ontario Government, etc.). Meal per diems are only reimbursement when funded by an external agency (i.e. CIHR grants).

- If an itemized receipt is not provided or your receipt is lost you must complete and submit the [Reimbursable Expense for which there is No Original Receipt form](#).
- Original, dated restaurant receipts are required for reimbursement of actual expenses (i.e. detailed restaurant bill). Please note the credit card receipt may be used to substantiate the restaurant gratuity.

## Vacation / Personal Travel Combined with Business Travel

- If a vacation is taken prior to or after the conference, the vacation request must be approved by the appropriate authority prior to making travel arrangements.
- Additional costs incurred, due to the vacation, will not be reimbursed. Such costs may include additional travel fees due to altered dates of travel and additional hotel fees due to extra occupants or additional nights.
  - Please visit the [University of Toronto, Financial Services – Personal Travel Combined with Business Travel](#) for additional details.

## Cancellation

- In situations of extenuating and severe circumstances, the DoM will cover the costs associated with last minute cancellations.
  - Such circumstances may include death in the family or illness, in which supporting documents will be requested.
- Please notify the DoM and/or Division immediately if cancellation is required.

## Reimbursement Process

Requests for reimbursement should only be submitted after the event. Occasional exceptions can be made. Please contact the DoM to confirm.

- Complete the [Personal Expense Reimbursement form](#).
- Sign the form as claimant and submit to the appropriate authority for approval, along with:
  - Original receipts
  - Boarding passes
  - Conference name tags
    - Credit card statements may be required in cases where proof of payment has not been provided.

- Once approved by the appropriate authority, the documentation will be forwarded to the DoM's finance team for processing.
- After the reimbursement has been entered into the system you will receive a cheque within 2 – 4 weeks.
  - The cheque will be delivered to the address indicated on the reimbursement form.
  - Direct deposit will be arranged for active employees who are on the U of T payroll system.