

Research Travel Claim Quick Reference Tool

This Quick Reference Tool is for reference purposes only; it is not meant to be attached to claims. Its use is optional. This tool does not replace the University of Waterloo Travel Policy or the Guidelines for Travel Expenses; please refer to them for further detail.

<p>Authorization</p> <ul style="list-style-type: none"> <input type="radio"/> Claimant <input type="radio"/> PI or delegate¹ <input type="radio"/> One Over One <input type="radio"/> Dean (> 4 months) 	<p>General</p> <ul style="list-style-type: none"> <input type="radio"/> Affiliation if traveler not PI (research only) <input type="radio"/> Date(s) of travel <input type="radio"/> Destination(s) of travel
<p>Trip Purpose²</p> <ul style="list-style-type: none"> <input type="radio"/> Detailed trip purpose including the circumstance for the travel and the reason why the travel was necessary for the research funded by the grant <input type="radio"/> Includes the name(s) of people or location(s) visited (ideally attaching an agenda or invitation) 	
<p>Miscellaneous</p> <ul style="list-style-type: none"> <input type="radio"/> Exchange rate support³ <input type="radio"/> Receipts are itemized <input type="radio"/> Receipts include proof of payment 	<p>Conferences</p> <ul style="list-style-type: none"> <input type="radio"/> Prospectus including agenda (research only) <input type="radio"/> Travel dates align with conference dates (explanation provided where unclear)
<p>Meals and Hospitality</p> <ul style="list-style-type: none"> <input type="radio"/> Maximums are considered <input type="radio"/> Name(s) / affiliation(s) for hospitality <input type="radio"/> No alcohol (research only) <input type="radio"/> Actual expenses claimed⁴ <input type="radio"/> Receipts are itemized (including hotel meals) <input type="radio"/> Justification for meals purchased when included in conference fee 	<p>Transportation</p> <ul style="list-style-type: none"> <input type="radio"/> Justification for mileage > 500km (one way) <input type="radio"/> Mileage claims include destinations & dates <input type="radio"/> Fuel receipts for rented or UW vehicles only <input type="radio"/> Boarding passes included or note made <input type="radio"/> Class of travel is economy or equivalent <input type="radio"/> Justification for baggage fees (3 or more) <input type="radio"/> Flight change or cancellation fees are justified and related to research

¹ Student travel must be signed by the PI

² Including a detailed trip purpose is required for Tri-Agency grants and a best practice for other grants. The conference name, the location or person visited or generic purposes such as "research meeting", "collaboration", "fieldwork" etc. are not satisfactory trip purposes. Sample trip purpose: "To attend the research conference on ABC (the circumstance) which is relevant to my grant funded research on XYZ because(the reason)"

³ Can be supported by credit card or bank statements, Oanda (use buy rate +3%) or currency exchange receipts

⁴ If a grant specifically allows per diems, the portion of the agreement noting this should be included with the claim