EXPENSE CLAIM FORM

PERSONAL INFORMATION

Please submit one expense claim for each individual conference / travel period.

Last Name:		First Name:	
Position / Title:			
Mailing Address:			
Phone N°:		Email Address:	

PURPOSE OF CLAIM

Please provide a general overview of the purpose of the expense claim including event details (titles/dates) if applicable. For reimbursements from tri-council funds, please indicate affiliation to the research project.

Start Date: (MM/DD/YY)		End Date: (MM/DD/YY)	

GENERAL EXPENSES (NON -TRAVEL)

Please complete this section for non-travel related expenses. Complete page 2 for claiming conference, travel and/or accommodation expenses. *Note for all equipment purchases over $1,000 requires a completed A1 form. Contact division.admin.comtl@ssss.gouv.qc.ca for questions about claiming reimbursement for equipment.

RCT #	Date	Vendor	Details	Budget N°	Secondary code	Amount ($)
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
					TOTAL GENERAL EXPENSES	$ 0.00

TRAVEL AND ACCOMODATION EXPENSES:

Expenses	# of RCTS	Budget N°	Secondary code	Amount ($)	Comments
Conference registration: Ensure the names of all individuals registered is indicated					
Car rental:					
Gas – rental car only:					
Taxi:					
Parking:					
Mileage – for use of personal vehicle only: $0.650/KM Must include Google map of route taken					
Fare (bus/train/air): lowest fare required for tri-council grants; boarding passes required, details for any change/baggage fees required					
Accommodations: include detailed receipts for accommodations in hotels/motels/rentals. For private stays with family, friends or colleagues $30.00 per night may be claimed (please provide details of date & location)					
Meals: individualized, itemized receipts are required for all claims. Per diem may be claimed in lieu of itemized receipts					
Other: Please provide description in comments.					
			TOTAL TRAVEL EXPENSES	$ 0.00	
			TOTAL CLAIM	$ 0.00	

As the claimant, I certify that:

Detailed and complete receipts are included with my claim and I have kept a copy of my completed expense claim and receipts for my records.
The claimed expenses were incurred by me for the above stated period.
The expenses being claimed are only related to myself or eligible staff/students (as indicated) and not my family or personal contacts.
The expenses are in accordance with granting agency financial parameters for the account indicated.
I have not received reimbursement from any other sources for these expenses.
I will keep the original receipts for 7 years.
I have reviewed and understand the reimbursement parameters and am aware that reimbursements may be adjusted if required.

Claimant`s name: _____ Signature: _____ Date: _____

As the Researcher / Authorized Individual, I certify that:

I authorize the attached expense claim for the budgets indicated.
I have authority to approve expenses.
Expenses are in keeping with the granting agency policies and parameters.

Approver`s name: _____ Signature: _____ Date: _____

GENERAL PROCEDURE

Submit one claim per travel period. All claims must include an Expense Claim Form (completed in full, signed and dated by claimant and researcher and include all detailed and original receipts). Claims should be submitted within 30 days after the date of the event. Incomplete claims will result in payment delays.

SUBMITTING CLAIMS

To submit an expense claim:

- Complete the attached form & attach receipts (1 receipt per page)
- Obtain signatures from authorized individual
- First time claimants: please include a void cheque for the account where the funds should be deposited
- Scan your completed form and individual receipts and email: division.admin.comtl@ssss.gouv.qc.ca

GENERAL EXPENSES PROCEDURE

Original detailed receipts must be submitted with all claims (credit card/debit slips are not accepted).

Only expenses for the researchers or eligible staff/student(s) will be reimbursed. Travel for personal reasons or for family/personal contacts is not eligible for reimbursement.

Reimbursements may be adjusted based on granting agency and organizational policies.

By signing the expense claim form, the claimant is certifying that:

- They have not received reimbursement for the expenses from another source
- The expenses are eligible based on the granting agency parameters
- The claim is for the purposes indicated and has been approved by the budget holder (PI/researcher)

Reimbursements using tri-council funds: Per tri-council guidelines, all travel and accommodation expenses must:

- Be a direct cost of research for which the funds were awarded, with benefits directly attributable to the grant
- Be effective and economical
- Not result in personal gain for members of the research team
- Not include alcohol
- **For claimants other than the grant recipient, the affiliation with the funded research/activities must be specified.**

The financial guidelines for Tri-Council funds are available HERE

RECEIPTS

Electronic copies of receipts may be submitted but must meet the following requirements: Tape 1 receipt per page

- Issued in name of claimant
- Include itemized breakdown of all charges, fees and taxes
- Indicate payment, date of service and complete vendor information

TRAVEL EXPENSE PROCEDURE

Mileage: The kilometer rate for use of personal vehicle is $0.650/km. Please include a Google map indicating the route travelled for all mileage claims.

Conference registration fees: Receipts must indicate the names & titles each individual registered.

Car Rental: Car rental and insurance costs will be reimbursed. Any charges for damages when insurance has not been purchased will not be reimbursed.

Meals: Itemized receipts are required (standalone credit/debit slips are not accepted).
Per diem rates may be claimed in lieu of receipts, however should be adjusted in cases where meals are provided at the event.

The maximum allowable per diem rate **within Canada** is $75.00 CAD per day:

- Breakfast: $14.00
- Lunch: $21.00
- Dinner: $40.00

The maximum allowable per diem rate **outside of Canada** is $100 CAD per day:

- Breakfast: $16.00
- Lunch: $28.00
- Dinner: $56.00

Alcohol is not eligible for reimbursement from grand funds. Alcohol may only be reimbursed on an exception basis based on eligible funding source in keeping with McGill's policy on hospitality available HERE. Director approval is required for any reimbursement.

Taxi/Parking: Detailed receipts indicating the date of service, vendor name/contact details, breakdown of charges and the total amount paid are required for reimbursement.

Gas: Fuel purchase is eligible for reimbursement for a car rental only.

Airfare/Bus/Train: Cost of the fare, seat selection and change fees are eligible for reimbursement. **Boarding passes must be provided for all travel claims.**

Accommodations: Standard rooms in a publicly available, registered business are eligible for reimbursement. For private stays with family, friends or colleagues $30.00 per night will be reimbursed (please provide written details of location and nights claimed).

Exchange rates: For reimbursement of exact amounts, documentation (bank/credit card statement) indicating the amount paid in CAD is required for processing. If not available, reimbursements for expenses in other currencies will be reimbursed the Canadian dollar equivalent using the bank of Canada rates on the day of purchase.

Maintaining records: Claimants must keep copies of their receipts and claims for 7 years.