

Frequently Asked Questions (FAQs)

Expense Reimbursement Practices

Important Note: If expenses are charged to a grant or award, the granting agency's guidelines or the specific award's terms—take precedence over university guidelines if they impose stricter restrictions.

1. Do employees need pre-approval for alcohol expenses?

Employees do not need pre-approval for reasonable food and alcohol consumption for business trips or to entertain non-university employees such as hosting a guest lecturer or potential faculty candidate. Pre-approval from the department head is required to serve alcohol at special social events for university employees. Divisions may enact more restrictive rules around the provision and reimbursement of alcohol. Refer to the [Meals](#) and [Hospitality](#) sections of the GTFM for more details.

2. Is a credit card statement required for proof of payment or foreign currency exchange?

In general, the original itemized receipt is sufficient supporting documentation for reimbursement of most expenses. [Credit card statements are not required as proof of payment](#), except in rare circumstances. For example, they may be requested as additional documentation only if other supporting documentation is insufficient or unavailable.

For expenses incurred in a foreign currency, Concur applies the exchange rate from the transaction date to calculate the Canadian dollar amount. The claimant may edit the calculated amount or the exchange rate if either amount differs from the Concur exchange rate. If the actual exchange rate entered by the claimant differs significantly from the Concur exchange rate, Concur will prompt the claimant to provide additional supporting documentation (e.g., a redacted credit card statement or currency exchange receipt). The redacted credit card statement should only be provided as support for the foreign exchange rate if the prompt appears in Concur.

Credit card statements are also not required to prove the claimant paid for an expense using a credit card in their name. When signing their expense report, the claimant is attesting to the fact that they incurred the expenses included in the expense report.

3. Is proof of stay required for accommodation?

Yes, a detailed hotel bill or an equivalent proof of stay is required for reimbursement. Refer to the [Accommodation](#) section of the GTFM.

4. How should employees document combined business and personal travel?

When personal travel is combined with business travel, employees will be reimbursed for the business portion of the trip, which is typically the lowest available airfare and standard business lodging. Employees must obtain, at the time of booking, and attach to their expense claim in Concur, quotes representing the business portion of the airfare and accommodation (i.e. without stopover, extension, upgrade or other incremental item). Refer to the [Personal Travel Combined with Business Travel](#) section of the GTFM for further guidance.

5. Are boarding passes required for air travel expense claims?

No, boarding passes are not required. Proof of travel is usually supported by other travel expenses incurred at the travel location (e.g., hotel bill) on the current or a future claim. However, if no other travel-related receipt is available, boarding passes may be used as proof of travel. A screen grab of an electronic boarding pass is sufficient for this purpose.

6. Do employees need pre-approval for an airfare upgrade?

Yes, airfare upgrades require pre-approval from a principal, dean, director, chair or senior executive to whom the traveller reports before booking. The approval documentation should be retained by the department and, if possible, attached to the expense claim in Concur to facilitate review and approval. Refer to the [GTFM Approvals section under Air and Rail Travel](#).

7. Are receipts required for taxi expenses?

Yes, receipts are required for all taxi expenses, including ride sharing services such as Uber. Claimants must upload these receipts in Concur. Refer to the [Allowable Miscellaneous Business Related Items](#) section of the GTFM for more information.

8. Do employees need to provide a business purpose for expense claims (e.g., hospitality/taxi/meals)?

Yes, claimants must document the business purpose of each expense claim. This information can be entered in the Detailed Purpose of Claim field in the expense report header in Concur. If more information is required for individual expenses, these can be entered under the Line Item Text (optional) field for individual expenses when multiple miscellaneous expenses are included in a report.

9. Do claimants need to provide the conference agenda/schedule?

For reimbursement, the GTFM requires the registration form or invoice (either is sufficient if they contain proof of payment). The conference agenda or schedule may be required by research bodies. Conference agendas may be requested to show

whether meals were provided by the conference to substantiate expense claims for meals or per diems. When submitting an expense claim for conference fees in Concur, the system will provide the following warning message to remind claimants to upload the conference agenda: “If conference fees are being paid with grant funds, please ensure a copy of your conference/seminar agenda is attached.”

10. Do claimants need to provide a list of attendees for group hospitality or catering expenses?

Yes, the [GTFM](#) requires claimants to document attendees. For small groups, individual names can be entered in Concur under Attendees (where available). For large groups, a list of attendees (e.g. registration list or sign-in sheets) can be attached in the Receipt section of Concur.

11. Do claimants need to complete a missing receipts declaration for future-dated flight or hotel reimbursements?

No, the [GTFM](#) does not require claimants to complete a missing receipt declaration to get reimbursed for paid airfare and accommodation expenses before the actual travel. Proof of travel or stay can be submitted with the remaining business trip expenses in a subsequent expense report.

12. Are an itemized meal receipt and credit card statement required for meal reimbursement?

As per [GTFM](#) guidelines, an itemized restaurant receipt is required for a meal reimbursement. A credit card slip (given by the restaurant) may be required as proof of payment for gratuity. For clarity, this is different than a credit card statement, which is not required.

13. Are an invoice and rental agreement needed for car rental reimbursement?

The [GTFM](#) requires proof of car rental, detailed cost breakdown and proof of payment. This could come in the form of an invoice, a rental agreement or both (which may depend on the documentation the car rental company provides).

14. Do employees need pre-approval for attending a professional development event or conference?

Yes, pre-approval is required, except for faculty who are paying for the conference expenses from their PI Funds Center or research funds. Where pre-approval is required, the claimant should retain the pre-approval documentation and, if possible, attach it to the expense claim in Concur to facilitate review and approval.

15. Do employees need pre-approval to speak at an event or conference?

No, pre-approval is not required unless the employee is requesting the use of operating funds for travel expenses. Where pre-approval is required, the claimant should retain the pre-approval documentation and, if possible, attach it to the expense claim in Concur to facilitate review and approval.

16. Do claimants need to provide itemized meal receipts for meals charged to a hotel bill?

If the claimant is claiming actual meal costs, itemized receipts are required, regardless of whether the meal was purchased at a restaurant or billed to a hotel. If the hotel bill includes itemized meal charges, it can be used as the receipt.

If the claimant is claiming the per diem rates, itemized receipts are not required.

17. Do claimants need to provide both an invoice and payment receipt for memberships and subscriptions?

Claimants must provide documentation that shows both the expense details and proof of payment. If a single document contains both, no additional receipt is required.

18. How long should claimants keep receipts?

Claimants should retain receipts until their reimbursement has been processed and received. Once submitted, receipts will be stored and accessible in Concur.

19. Do claimants need to provide a copy of their conference badge as proof of attendance?

No, the GTFM does not require a conference badge as supporting documentation.

20. How can claimants submit mileage for the use of a personally owned vehicle using Concur? Do they need to enter their home address?

According to the University's [Guide to Financial Management \(GTFM\) policy](#), personally owned vehicle should only be used for short trips when it is the most economical option or when no suitable public transportation is available (up to a max. of 500 km round trip). For longer trips, claimants may choose to use their own vehicle; however, reimbursement will be limited to the cost of the least expensive mode of transportation available for that route.

The University reimbursement rate is reviewed and adjusted from time to time. The current rate can be found [here](#).

When submitting a **Kilometrage Allowance** claim in Concur, claimants can use the **Mileage Calculator** to determine the distance traveled. They may enter the starting and destination addresses or, if they prefer not to disclose their home address, the nearest

intersections. If needed, the system-calculated mileage can be adjusted to reflect the actual kilometers driven.

For step-by-step instructions on how to submit a mileage claim in Concur, please refer to [this guide](#).