Reimbursement of Expenses
Requirements Checklist – Tri-Agency

McGill | RESEARCH ADMINISTRATION NETWORK

□	REQUIREMENT	EXPLANATION	EXAMPLE/COMMENTS
□	One comprehensive expense report per trip	Each trip must have its own separate claim. Travel expenses must be submitted within 30 days following the return date from the trip.	If a travel component is missing (e.g. hotel, airfare, etc.), an explanation is required (e.g. hotel was paid by the conference organizers).
□	Purpose of trip	Provide reason(s) why trip was necessary for the research. Spell out all acronyms.	*Attended a **conference** which discussed food science which is related to my grant because I am hoping to introduce a new technique in food engineering to stop food deterioration.* ***Fieldwork** in the Yangtze River; studied the irrigation system for my NSERC <name of award> research where I am analyzing the impact on rice cultivation.* ***Collaboration** at the University of <name> with Prof. <name(s)>; comparison of research findings related to <name> theory which is directly related to my research grant.* ***Archival work** at the Pointe-à-Callière; visited the archaeological remains of Befana, Saint Nicholas, Saint Lucy and Santa Claus to explain how holidays are celebrated in different parts of the world, which is directly related to my research grant.*
□	Claimant's affiliation to the grantee	To show how the claimant is linked to the research.	**Examples of affiliation:** • Graduate Student • Research Staff • Collaborator • Visiting Researcher • Guest Speaker • Project Manager *Mr. Smith, PhD student working on project X, for Dr. Xavier.*
□	Conference program/prospectus and Meeting Agenda	To demonstrate how the conference/meeting: • Is related to the research • That the travel dates align with the conference date • That meals are not double counted	For a **conference program/prospectus**, a few pages is acceptable, preferably the ones where the claimant is presenting (if applicable). The **prospectus** must include the conference name, location and dates of the conference and workshops. For a meeting, an **agenda or email** communication is acceptable. For a talk, a **poster** is acceptable. For collaboration, **proof of collaboration** is needed.
□	Per Diem	Meals that were not covered by the conference/workshop registration fee are allowed, therefore a per diem is allowed (breakfast, lunch and dinner). Per diem is not allowed if food was provided by the conference. Per diems cannot be claimed in instances in which the traveler chooses not to participate in the meals provided by the conference.	**Per diem rates in Canada:** $54 CAD for overnight trips $10 CAD for breakfast $16 CAD for lunch $28 CAD for supper **Per diem rates for outside Canada:** $70 for overnight trips $12 CAD for breakfast $21 CAD for lunch $37 CAD for supper

□	REQUIREMENT	EXPLANATION	EXAMPLE/COMMENTS
□	Meal receipts	Detailed receipts and proof of payment are required. For meal (and hospitality) reimbursement, the original meal receipt that outlines the actual items consumed is to accompany the claim. The credit card receipt is not valid. The Tri-Agency is looking to ensure no alcohol was purchased.	
□	Alcohol	Alcohol is not permitted and must be deducted from the receipt.	Include the alcohol as a "Non-McGill Expense" on the Request for Expense Reimbursement Claim.
□	Hospitality	It is expected that hospitality expenses are incurred for the purpose of research-related activities in the perspective that the hospitality can be used as a forum to facilitate and contribute to the achievement of the research objectives. Hospitality is allowed for networking purposes in the context of a formal courtesy between the grantee and guest researchers (e.g. grantee meeting with partners, stakeholders, guest researchers).	The following must be included: • The date(s) of the event(s); • Number of participants; • Purpose of the event; • Countersignature by the department head or dean for hospitality expenses claimed by the grantee.
□	Hotel Receipts	Detailed invoice and proof of payment are required.	If the hotel was booked online with a company like, Expedia or HotWire, the booking confirmation with the credit card statement is mandatory if proof of payment is not indicated.
□	Airfare	Detailed receipt and proof of payment are required. Economy fare only.	Where airfare includes avoidable stopovers or extended travel, a quote for direct airfare, must be obtained **at the same time** of the actual purchase.
□	Boarding passes	Mandatory if there is not enough evidence to place the person in the city.	Boarding pass is no longer required when other evidence exists to prove the trip occurred (e.g. one of the following is attached – hotel invoice, taxi chit, meal receipts).
□	Computers/Tablets/ Modems/Emerging Technology/Other Hardware and/or Specialized Software	Acceptable if required for research and if not normally provided by the institution. Requires an adequate justification.	The grantee must be able to explain how the expenditure is a direct cost of research and why it is needed for the conduct of the funded research project.
□	Supplies	Verify the Tri-Agency Financial Administration Guide for eligibility.	
□	Original currency on invoice/receipt	Ensure that both the transaction amount as well as the currency indicated in the expense report, **matches the total amount and currency,** as appears, on the paid receipt.	
□	Credit card statements	When credit card statements are attached, the amount reimbursed to the claimant must match that of the statement.	
□	Original Receipts	Credit card chits are not permitted. Tri-Agency requires that details of daily claims for expenditures have the supporting documentation and there is a justification for the expenses.	

Proper Authorization/Signatures:

CLAIMANT	SIGNATURE REQUIRED	COUNTER-SIGNATURE	COMMENTS
Student	Grantee	N/A	Delegation of signing authority is not accepted. If grantee is away from University, an email approval is acceptable provided that the specific expense report is attached to the email for the grantee to review and approve.
Visitor	Grantee	One-up[1]	Delegation of signing authority is not accepted. Claimant can sign the Visitor Claimant Sheet.
Grantee	One-up[1]	N/A	The one-up is usually the Department Head/Chair. If the Department Head is absent, either the acting Department Head/Dean must sign. If the researcher is a Department Head, the Dean must sign.
Delegate	Grantee or Grantee's One-up[1]	N/A	Claim must be signed by the grantee. When the grantee is away from the University, the one-up approval is required.
Other Research Personnel	Grantee or Delegate	N/A	

[1]One-up is the Chair, Dean or Department Head