

## Instructions for Travel Expense Report and Advance

### 1. Requesting an out-of-pocket advance prior to the trip:

- ☐ Employees (including student employees) can request out-of-pocket advance under “Advances and Expense Reports” – “Submit an Advance Request for Yourself” menu on Minerva;
- ☐ Students who are not employees, please ask the main office to submit an advance request under “Submit an advance request for someone else” on your behalf. The employee should enter the student’s McGill ID under “Responsible McGill ID” to set up the student as the “responsible person” so that the student can submit an expense report later to clear the advance on their own.
- ☐ All advances need to be cleared by submitting an expense report within 30 days following the return date of the trip.
- ☐ Please select “out of pocket in advance of trip” under “Advance Type”;
- ☐ The Third Party payments section should not be filled in if the payment is being made to a McGill employee or student.
- ☐ Receipts should indicate proof of payment such as “paid”, “charged to credit card” or “balance due zero” etc.  
If not, credit card statement needs to be attached as proof of payment.
- ☐ Please attach receipts and proof of payment to the advance request, sign and send in one PDF file to [sciencefinancepod3@mcgill.ca](mailto:sciencefinancepod3@mcgill.ca) for review.
- ☐ Example of description for Out-of-pocket advance:

I am Prof. X’s graduate student. I will be the Canadian Chemistry Conference and Exhibition (CCCE) held from Feb 16 - 19, 2022 in San Francisco, California. I am requesting reimbursement for expenses paid out-of-pocket in a total of \$ including airfare (\$), conference registration (\$) and lodging (\$).

### 2. Submitting an expense report to claim out-of-pocket expenses after returning from the trip:

- ☐ Please select “Advances and Expense Reports” – “Submit an Expense Report for Yourself” menu on Minerva. Please DO NOT select “Start an Expense Report to be finished by Someone Else”;
- ☐ Please select “travel” under “purpose” and NOT “professional development fund”; For virtual conferences, please select “other personal reimbursements”;
- ☐ Please enter the full name of the conference (not just acronyms), dates, location of the conference under “Describe purpose”;
- ☐ When conference registration and membership are the only expenses to be claimed, such as virtual conference or conference held in Montreal, expenses should be claimed through an expense report and NOT an advance. Please indicate in “Describe purpose” that: This is a virtual conference / online workshop / a conference held in Montreal, and therefore no other expenses will be claimed.

- ☐ Third Party payments section should not be filled in if the payment is being made to a McGill employee or student.
- ☐ Under “transaction amount”, please enter the amount in the original currency indicating on the invoice. Exchange rates for USD, GBP and EURO are automatically populated. Please override it with the exchange rate shown on your credit card statement (if applicable).
- ☐ If you have requested an advance prior to the trip, please include all advance items (airfare, conference registration, lodging, etc.) along with other expenses incurred during the trip in the expense report. Please check off the advance box after clicking the “complete- submit request” button in order for the advance to be linked and cleared.
- ☐ Meals (Per diem): fill in the per diem chart and enter the total amount as one item on the expense report. When per diem is being claimed, meal receipt are not required. When meals are being claimed with actual receipts, detailed receipts indicating items ordered should be provided.
- ☐ Meal expenses (receipt/per diem) cannot be claimed for conferences held in Montreal.
- ☐ Please Number the receipts to match the item number indicated on the expense report (required for all expense reports).
- ☐ Expense reports related to travel must be submitted within 30 days following the return date of the trip;
- ☐ For conferences, please attach the conference schedule indicating the full name, date, location and schedule of the conference to the expense report;
- ☐ When meetings with research collaborators, please attach email invitations/exchanges as supporting documents.
- ☐ Receipts should indicate item purchased and proof of payment. For example, “paid”, “charged to credit card”, or “balance due zero” etc. If not, credit card statement is required. Please blacken out personal information except for the last four digits of your credit card number and your name. Your name should appear on the credit card statement.
- ☐ When personal travel combined with business, please obtain a quotation for the itinerary purely related to the business portion of the trip. Usually the itinerary should start one day before and one day after the business. Only the business portion is reimbursable. Enter the personal portion under “non-McGill expenses”.

As per Finance, the quotation for the itinerary purely related to University business must be obtained on the same day and within two hours of the actual airfare ticket that was booked. The quotation must include the travel agency name/website, day, time, and must be for the lowest logical airfare. The Claimant will be reimbursed the lowest airfare.

- ☐ Only economy airfare is reimbursable. Seats in a fare class greater than the highest economy are only permitted for flights outside of North America and require prior approval of the Claimant's Dean.

- ☐ Please include boarding pass when no other evidence to prove the trip has occurred (e.g. hotel invoice, meal receipts, taxi receipts etc.
- ☐ When car rental is being used for travel, the cost of car rental should not exceed the equivalent rail or economy airfare.
- ☐ Please attach receipts and supporting documents to the expense report, sign and send [in one PDF file](mailto:sciencefinancepod3@mcgill.ca) to [sciencefinancepod3@mcgill.ca](mailto:sciencefinancepod3@mcgill.ca) for review.

### 3. Tips for cost sharing:

- ☐ Please attached the following documents to the expense report when sharing costs with fellow students:
- ☐ The original invoice indicating the full amount being paid (regardless wether you are the payer of the invoice or not). If the invoice has no indication of payment made, credit card statement needs to be provided as proof of payment;
- ☐ Proof of payment for cost sharing: such as e-transfer confirmation to prove that you reimbursed the payer, etc.
- ☐ When entering cost sharing items on the expense report:
- ☐ Under “transaction amount”, please enter the total amount in the original currency indicating on the original invoice and enter the difference under “Non-McGill expenses” to give you the “Expenses in CAD” that you paid out-of-pocket.
- ☐ Please provide cost sharing information such as full name of the students you shared costs with, amount reimbursed, etc.
- ☐ Examples:

Example 1: Uber from Los Angeles airport to hotel (invoice amount: USD \$36) split between 3 students. Student A paid for the invoice and you reimbursed 1/3 of the cost to A via e-transfers.

Description	Trans. Amount \$	Non-McGill Expense	Allowable Expenses	Curr.	Exch. Rate	Expenses CAD \$
Travel - Taxi: Uber from Los Angeles airport to hotel split between 3 people (name of student A, B and C). Student A paid for the invoice and I reimbursed 1/3 of the cost to A via e-transfers. I am claiming 1/3 of the cost.	36.00	24.00	12.00	USD	1.2987	15.58

Example 2: 5-night stay at Hotel xxx, March 2-6 (invoice amount: USD \$1,500) split between student A and yourself. You paid for the bill and received reimbursement from A via e-transfer.

Description	Trans. Amount \$	Non-McGill Expense	Allowable Expenses	Curr.	Exch. Rate	Expenses CAD \$
Lodging - Hotel/Motel/Inn (Receipts): 5-night stay at Hotel xxx, March 2-6, split between student A and myself. I paid for the bill and received reimbursement from A via e-transfer. I am claiming half of the cost.	1,500.00	750.00	750.00	USD	1.2718	953.85