

Guest/Student Travel & Business Expense Claim Form

Instructions

This form is to reimburse students and guests for eligible travel and business expenses incurred while on University of Manitoba business.

This form is a fillable pdf document. Expense claims should normally be submitted within 30 days of the expense being incurred. Please ensure you obtain an RN# from the U Manitoba website: [University of Manitoba - Financial Services - Reference Number Form \(umanitoba.ca\)](https://umanitoba.ca/financial-services/reference-number-form) and enter the number as shown below.



**University
of Manitoba**

Guest / Student Travel & Business Claim Form

UofM Employees must use Concur

Clear Form

RN 123456

other

reference: _____

Section A: Claimant Information

All the information in this section must be complete for the claim to be processed. The claimant's home address must be provided (do not use the host department's campus address or the claimant's work address).

A Claimant Information <small>[all information in this section is required]</small>	
<input type="radio"/> Guest	Claimant Name: Jennifer Merrell <small>(first/middle/last)</small>
<input checked="" type="radio"/> Student	Claim Date: Oct/01/22 <small>mmm dd yy</small>
<input type="radio"/> Other <small>(explain in Section B)</small>	Home Mailing Address: <small>(claimants will be paid by cheque)</small> 2025 Portage Avenue Winnipeg, MB R3J 2Y3
Employee/Student ID# 7123456	Phone: (204) 474-8596
	Email: jennifer.merrell@umanitoba.ca

Section B: Travel Information

For the 'purpose' field, please be specific (e.g. provide the name of the conference, "collaboration with Dr. Z to discuss ABC", etc). Please include any additional information regarding the claim in this section. If this is on a Research fund, how do the expenses relate to the research? Was it approved by the Research Ethics Board? Every claim requires context.

B Travel Information <small>[all information in this section is required]</small>	
Departure Date: Sep/22/22	Return Date: Sep/27/22
	Trip Destination: Las Vegas, Nevada
Purpose of claim: <small>How does this relate to University business? If claiming on a Research fund, how does this relate to the research project? Is any extra context around special circumstances necessary to process this claim?</small> Presenting research paper at 2022 Student Advisors' Conference held Sep 23-26, 2022 in Las Vegas, Nevada.	
Are these all the expenses related to the trip? <input checked="" type="radio"/> Yes <input type="radio"/> No	If no, what's missing?


Section C: Research Funding Section

If this expense is being applied to a research fund, the claimant's affiliation with the project and supporting details are required. Supporting details include, but are not limited to, dates, place of travel, name of conference/event, and/or purpose of meeting. Please attach your conference agenda or program to your claim.

C Research Funding Section <small>(required information for all research expenses)</small>	
Claimant Relationship to Grant:	<input type="radio"/> Grantee <input checked="" type="radio"/> Student researcher <input type="radio"/> Research personnel <input type="radio"/> Visiting researcher <input type="radio"/> Other:
Type of Trip:	<input checked="" type="radio"/> Conference <input type="radio"/> Collaborative Trip <input type="radio"/> Field Work <input type="radio"/> Other:

Section D: Authorization

Please do not sign the claim form at this time. This allows for corrections and adding funding, etc. to your claim. Once your claim is processed by the department, it will be returned to you for a final signature before being submitted.

D Authorization <small>(please determine the financial authorities based on the FOAPs used on page 2. These signatures should be obtained as the last part of completing this form.)</small>	
<i>I hereby certify that this is a correct statement of expenses which were incurred on University business and that all actual or anticipated payments or reimbursements from others have been incorporated (in compliance with UofM Travel and Business Expense procedures).</i>	
Claimant's Signature	Date: 
Financial Authority 1	(please print) Signature
Financial Authority 2	(please print) Signature
Financial Authority 3	(please print) Signature
Financial Authority 4	(please print) Signature
Department Contact	Name: Leah Phillips Phone/Email: 474-9220 / leah.phillips@umanitoba.ca

Section E: Summary of Expenses

Filling out your expenses:

Date: this should match the date on the receipt.

Expense Descriptions: this is where the expense details go (ie: conference registration for CAUBO 2017, etc.). If a different currency than Canadian was used for the transaction, please indicate the exchange rate in the description.

Amount Paid: this is where the amount paid, in the currency in which it was paid, needs to be entered. This needs to match the receipt provided. So, if you paid \$350 USD for your conference registration, you'll enter \$350 here.

Currency Paid In: This is where the currency of the payment is indicated – so, following the above example, in this column, enter USD. No conversions have been made at this point. If the payment was in Canadian funds, please still indicate CAD in this column so we can be sure no conversion took place.

Amount Requested: Please leave this section blank.

Req'd Currency: Please leave blank.

