



<b>Guideline Name:</b>	Travel and Business Expense Guideline
<b>Effective Date:</b>	May 1, 2018
<b>Date Approved:</b>	May 1, 2018
<b>Approved by:</b>	Rady Faculty of Health Sciences Council of Deans
<b>Review Date:</b>	March 31, 2023

**PURPOSE**

To provide guidance or more restrictive constraints over specific business and/or travel expenditures Travel and Business Expense Claims Procedure below for the Rady Faculty of Health Sciences. In each instance the section in the Procedure in which guidance is being provided or to which the constraint applies will be indicated. The following guideline applies regardless of ultimate source of funding.

**DEFINITIONS**

**Hospitality** – Food and/or beverages for events where there is more than one person. An individual travelling on University business and claiming their individual meal is not considered hospitality.

\*\* The University has an exclusive agreement with Aramark with respect to providing catering services within U of M space. Therefore, Aramark must be used for all Hospitality or Special Events held within U of M space unless a Catering Waiver has been approved by Dining Services.\*\*

**Special Events** – Hospitality that involves meeting with potential donors or alumni as well as milestone events such as College Anniversaries where there may be dignitaries present. Additional events maybe approved by the Senior Financial Officer of each representative College.

**GUIDELINE**

**1. Meals while traveling (Section 2.20)**

a. Actual costs (meals with receipts) will have the following caps:

<u>Region of travel</u>	<u>B'fast</u>	<u>Lunch</u>	<u>Supper</u>	<u>Per Diem</u>
Canada	\$15	\$15	\$30	\$60
USA/Africa	\$20	\$20	\$40	\$80
Asia/Latin America/Oceania	\$20	\$20	\$50	\$90
Europe/Caribbean	\$25	\$25	\$60	\$110

- b. To avoid the requirement to submit receipts the daily per diem allowance can be claimed, and would be considered the daily maximum. If you plan a mix of actual receipts and per diem within a given day, the daily per diem will remain the maximum total claim for that day.

## 2. Travel Exceptions to the Travel and Business Expense Policy (Section 2.3)

- a. For exceptions to the U of M Travel and Business Expense Claims Procedure; airfare using personal cards & expenses 12+ months old, all supporting documentation must accompany the exception request form provided by U of M Travel Services. These should be submitted to the Director of Finance for review and RHFS Dean signature. It will be the submitters responsibility to obtain VP approval following College signoff.
- b. Exceptions to this guideline can be requested via email from the Director of Finance, Rady Faculty of Health Sciences. A special exception form is not required.

## 3. Hospitality/staff events (Section 2.21)

- a. All hospitality is to be pre-approved at the following levels via the RFHS Hospitality approval form (note the meal max per person of \$75) attached:
  - i. **Senior Financial Officer (SFO)** – up to \$40 per person (including tax and gratuity)
  - ii. **College Dean** – over \$40 and up to \$75 per person (including tax and gratuity) following initial review and approval by the SFO
- b. CPD events where the individual registrant fees cover the entire cost of the event including the meal do not require pre-approval via the Hospitality form, and can be approved by the one-over-one within the College/Department.
- c. Research related hospitality/staff events must be approved by the respective FOP Grant Accountant (email will suffice), and included in the submission to the SFO.
- d. Approval will not be granted for internal Faculty/Staff/Student meetings, Journal Clubs or Grand Rounds. An exception may be granted by the SFO in specific cases where funding is provided by external partners specifically for this purpose.
- e. Recruitment & Visiting Professors dinners are limited to a maximum of 4 people in attendance (3 U of M Faculty plus the guest). A reasonable amount of alcohol may be considered for these events, as discussed with your SFO. Exceptions for number of attendees may be considered for a Dean recruitment.
- f. Meals with students during Recruitment & Visiting Professors visits are not considered an acceptable hospitality, and any exceptions will need to be approved by the SFO.
- g. Faculty/Staff/Resident planning retreats & events are limited to one event per year for each College or Department. Holiday parties are not considered an acceptable event, as these are provided on a Faculty and/or College level for all Faculty/Staff.
- h. Formal graduation dinners must be student funded. Colleges or departments are permitted to make a monetary contribution to these events if their budget allows. Refreshments and snacks may be permitted following College convocation ceremonies when they are not included in the University convocation ceremony.
- i. Retirements – a small cake and coffee party is permitted, any larger event requires ticket sales or personal/private funding.
- j. CaRMS Interviews – the maximum University approved funding per person will be communicated annually from the Deans office, Max Rady College of Medicine.

- k. Alcohol may be permitted at Special Events, as pre-approved by the SFO & College Dean. Total expenses are to remain within \$100 per person (inclusive of food, beverages, taxes, tip, etc.).
- l. Alcoholic beverages are not an allowable expense except as noted in (e) and (k) above and under no circumstance is alcohol to be charged to research funds. Use of a cash bar is acceptable and recommended for events not otherwise approved.

#### **4. Conferences (Section 2.3)**

Limited to one (1) per person, per fiscal year, for management and other senior administrative staffing. In situations where other staff are the most appropriate attendees, this would be considered appropriate when requested by a one-over-one with management agreement. Conferences are not to be used to address personal professional development. All attempts are to be made to send the minimum number of individuals to any conference, with the expectation of information gained being disseminated to additional staff at a later date.

#### **5. Parking (Section 2.45)**

Airport parking charges while traveling on University business will be permitted up to a maximum of \$100/trip. Any amounts exceeding the maximum should be approved by the SFO with justification provided regarding the most economical travel vs taxi transportation to and from the airport.

#### **6. Caregivers (Section 2.49)**

Claimants requiring an accompanying caregiver while traveling may be considered following approval of the one-over-one in conjunction with the Director of Finance.

**GUIDELINE CONTACT:** Director of Finance, Rady Faculty of Health Sciences

**CROSS REFERENCES** – This guideline should be cross referenced to the following relevant Governing Documents:

Travel and Business Expense Claims Policy and Procedures – December 2017

[http://umanitoba.ca/admin/governance/media/Travel\\_and\\_Business\\_Expense\\_Claims\\_Procedure - 2017\\_12\\_13.pdf](http://umanitoba.ca/admin/governance/media/Travel_and_Business_Expense_Claims_Procedure_-_2017_12_13.pdf)

# Rady Faculty of Health Sciences

## Hospitality Event Pre-Approval Form

Please provide completed form to Rady FHS Finance, who will submit for final approval and return via email.

College (circle)	Dentistry / Medicine / Nursing / Pharmacy / Rehab Sciences / RFHS		
Department/Unit Hosting:			
Name of Event:			
Date:			
Location:			
Type of Event/Purpose:			
Attendees	<input type="checkbox"/>	Internal	<input type="checkbox"/>
			External
Number of Attendees (ie # of staff, professors, donors):			
Food & Beverages Served:			
(alcohol is <u>not</u> an allowable RFHS expense, and should not be included for pre-approval or reimbursement)			
Caterer:			
Total Catering Charges:	\$		Per person =
Funding	<input type="checkbox"/>	Internal	<input type="checkbox"/>
			External
FOP (amount per FOP)			
(See acct #70676 for options)			

Form completed by: \_\_\_\_\_ Date: \_\_\_\_\_

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_  
(Department Head Signature)

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_  
SFO Signature

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_  
Dean Signature

**Email completed form to:** [Sam.Vagianos@umanitoba.ca](mailto:Sam.Vagianos@umanitoba.ca) - Dentistry/Rehab Sciences  
**cc: relevant College** [Amanda.Kinnell@umanitoba.ca](mailto:Amanda.Kinnell@umanitoba.ca) - Medicine/RFHS  
[Mark.Boiteau@umanitoba.ca](mailto:Mark.Boiteau@umanitoba.ca) - Nursing/Pharmacy