



UNIVERSITY OF MANITOBA

RESEARCH TRAVEL COMPLIANCE GUIDELINES

What kinds of travel are eligible?

- Field work (Archival, Historical etc.)
- Research conferences
- Collaborative trips
- Sabbatical

Who can travel on research grants?

- Grantee
- Research personnel
- Students working with grantee
- Visiting researchers

What travel expenses are eligible?

- Lowest logical airfare or cost of land travel up to the cost of airfare
- Meals or per diem (See policy for per diem rates and regulations)
- Mileage (See policy for rates)
- Accommodation
- Travel cancellation insurance and seat reservation charges
- Travel health insurance for research personnel who do not receive any such benefits from their institution and/or other sources
- Safety related expenses for field work such as protective gear, immunizations etc.
- Entry visa fee for grantees and/or research personnel when required for research
- Travel and subsistence expenses of collaborators related to research planning and exchanging of information with the grantee or for the dissemination of research results (NSERC and SSHRC only)
- Relocation costs of eligible research personnel and immediate family members (economy airfare or cost of land travel up to the equivalent of economy airfare)
- Child care expenses while a single parent or nursing mother is travelling subject to limitations

What travel expenses are non-eligible?

- Commuting costs of grantees and research personnel between residence and place of employment, or between two places of employment
- Passport and immigration fees
- Costs associated with thesis examination/defence, including external examiner cost
- Reimbursement for airfare purchased with frequent flyer points program
- Alcohol, inflight/room movies, personal memberships in clubs, gifts, hotel “no-show” charge, other conference activities

What are the required supporting documents?

- Purpose of trip
- Affiliation of traveler to research project if other than the grantee
- Dates and destinations (person or institution visited)
- Conference prospectus/program indicating the dates of conference or workshop
- Original receipts for all expenses (detailed meal receipts with a list of attendees, transportation, accommodation, purchases)
- Approval from a FOP signing authority (Primary signing authority for student travel) and the traveler’s one over one
- Justification for the expense when the direct link to the research is not obvious

A separate claim must be prepared for each trip.

Do you have a research finance question? Email ask-finance-for-researchers@lists.umanitoba.ca



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When spending research funds, make sure you are **R-E-A-D-Y!**

- **R**elation of expense to research project
- **E**ligibility of expense (UM/Agency policy/End dates)
- **A**uthorization from Signing Authority
- **D**ocumentation requirements
- **Y**ou have available funds (FAST)

DOCUMENTATION REQUIREMENTS

Journal Entries

- FAST printout showing the charge to be transferred
- Copy of the invoice
- Written approval from the Primary Signing Authority (PS) or Alternate Signing Authority (AS) of the FOP to be debited/charged before the JE is processed
- Reason for the transfer
- Justification for the expense when the direct link to the research is not obvious

A copy of the above listed documents should be sent to Research Accounting at 404 Admin.

Interdepartmental Charge (IDC)

- Documentation indicating the exact charge made
- Method of calculation or attribution
- Written approval from the PS or AS before the IDC is completed
- Justification for the expense when the direct link to the research is not obvious

Staff Appointment

- Duly completed VIP appointment form with approval from PS/AS and Department Head/Dean
- Weekly timesheets approved by PS/AS submitted to Payroll

Salary Transfers

- Printout from FAST of the Current Year –Actuals by position report showing the employee details and pay
- Completed salary journal voucher (online) or GL Correction Form & approved by PS/AS
- Email or documentation stating the reason for the salary transfer

NON-ELIGIBLE EXPENSES

- Administrative/management salary/fees, discretionary severance pay
- Installation, standard monthly connection or rental of telephones, voicemail
- Insurance cost for equipment & research vehicles, construction/renovation or lab rental
- Living expenses, cost of regular clothing
- Library acquisitions, computer & other information services provided by institution
- Entertainment, alcohol, hospitality & gifts
- Education related costs (thesis preparation, tuition and course fees leading up to a degree)
- Monthly parking fees
- Costs associated with regulatory compliance (ethical review, biohazard, radiation safety, environmental assessments or provincial or municipal regulations)

GENERAL REMINDERS

- Monthly FOP reconciliation should be done and documented
- Documentation for in-kind contribution should be maintained
- Supporting documentation should be kept for 7 years
- Overhead cannot be charged to Tri-Council funds
- Credit card slips/statements alone are not acceptable receipts

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