

UNIVERSITY OF MANITOBA POLICY

Policy:	TRAVEL AND BUSINESS EXPENSE CLAIMS
Effective Date:	October 10, 2008
Revised Date:	December 1, 2014
Review Date:	December 1, 2024
Approving Body:	President
Authority:	
Responsible Executive Officer:	President
Delegate: (If applicable)	Vice-President (Administration)
Contact:	Comptroller
Application:	All University Employees and Students

Part I Reason for Policy

- 1.1 To set out business and travel expenses of University employees and students that are eligible for reimbursement by the University.

Part II Policy Content

Introduction and Principles

- 2.1 The University has a fiduciary responsibility to the public, external sponsors, the Province of Manitoba, certain tax and regulatory bodies, private donors and its students to ensure that funds entrusted to it are managed responsibly and subject to appropriate control procedures.
- 2.2 With respect to the reimbursement or payment of travel and business expenses to employees and students, the University will comply with all Federal and Provincial tax regulations and external sponsor expense policies or restrictions.
- 2.3 The University will reimburse employees and students for reasonable expenses incurred for legitimate University business purposes.

- 2.4 The rule for approval is “one-over-one.” All Travel and Business Expense Forms must be approved by the Claimant and approved by a senior person who is on an organizational level above that of the Claimant and will normally be the person to whom the Claimant reports. This rule applies as well for Principal Investigator where the Principal Investigator is also the Claimant. If clarification on external sponsor guidelines is necessary, please contact Research and Special Fund Accounting Services. Visiting researchers expenses are to be approved by the host’s one-over-one.

Definitions

- 2.5 The following terms have the following defined meanings for the purpose of this procedure:
- (a) “Claimant” means an individual making a Claim pursuant to the Travel and Business Expense Claims policy and procedure.
 - (b) “Principal Investigator” means the individual or individuals, including co-investigator(s) who is/are primarily responsible for carrying out the research and research-related activities.

Part III Accountability

- 3.1 The Office of Legal Counsel is responsible for advising the Vice-President (Administration) that a formal review of this Policy is required.
- 3.2 The Vice-President (Administration) or Comptroller is responsible for the implementation, administration and review of this Policy.
- 3.3 Students and all University employees are responsible for complying with this Policy.

Part IV Authority to Approve Procedures

- 4.1 The Vice-President (Administration) may approve Procedures, if applicable, which are secondary to and comply with this Policy.

Part V Review

- 5.1 Governing Document reviews shall be conducted every ten (10) years. The next scheduled review date for this Policy is December 1, 2024.
- 5.2 In the interim, this Policy may be revised or repealed if:

- (a) the Vice-President (Administration) or the Approving Body deems it necessary or desirable to do so;
 - (b) the Policy is no longer legislatively or statutorily compliant; and/or
 - (c) the Policy is now in conflict with another Governing Document.
- 5.3 If this Policy is revised or repealed all Secondary Documents, if applicable, shall be reviewed as soon as possible in order that they:
- (a) comply with the revised Policy; or
 - (b) are in turn repealed.

Part VI Effect on Previous Statements

- 6.1 This Policy supersedes all of the following:
- (a) all previous Board of Governors/Senate Governing Documents on the subject matter contained herein; and
 - (b) all previous Administration Governing Documents on the subject matter contained herein.

Part VII Cross References

- 7.1 This Policy should be cross referenced to the following relevant Governing Documents, legislation and/or forms:
- (a) [Travel and Business Expense Procedure](#)
 - (b) [Petty Cash Policy and Procedure](#)
 - (c) [Recruitment Relocation Allowances Policy](#)