October 23, 2020

To: Vice-Presidents
   Associate Vice-Presidents/Vice-Provosts
   Deans and Directors
   Executive office Directors

From: Janice Ristock, Provost and Vice-President (Academic)
      Naomi Andrew, Acting Vice-President (Administration)

Re: Approval Requirements on Professional Development and Business Expenses

As part of the University of Manitoba’s ongoing efforts to ensure our processes support our shared commitment to financial accountability and effective stewardship of funds, we are writing to provide additional guidance regarding travel, business and professional development expenses.

The Travel and Business Expense policy and procedures already outline that all individuals claiming business expenses for reimbursement are to obtain pre-approval from their one-over-one prior to incurring the expense.

To ensure this is applied across the University, the following updated procedures are effective immediately for all Faculty and Staff:

1. Professional Development (PD) expenses must include documented pre-approval from an individual’s one-over-one approver; this approval is required before the PD is completed and expenses are incurred.

   Professional development expenses include, but are not exclusive to conference registrations and related expenses (transportation, accommodations, meals), individual professional memberships, and all courses, seminars, webinars, or other mediums used to obtain professional career development.

   Pre approval is not required on research funds and “travel and expense funds” for UMFA members (clause 27 UMFA collective agreement).

2. All travel and business expenses, including professional development and individual professional memberships are no longer permitted to be paid through EPIC purchase orders (POs), non-PO invoices or the Pcard. These expenses are required to be submitted for reimbursement through the Concur Travel and Business Expense tool along with the completed pre approval.

To facilitate the pre approval process a form has been made available here, though faculties and units may develop their own form to capture specific information related to their area.
As a community we are each obligated to understand the rules and procedures set by the University of Manitoba. You can review the Travel and Business Expense Claims Policy and Procedures at http://umanitoba.ca/admin/governance/governing_documents/financial/travel_and_business_expense_claims.html

Please work with your Faculty or Unit Business Manager to ensure proper procedures are followed.

Expenses that have not been processed following the above guidelines or those that require further explanations or evidence of approval will be returned to the individual who submitted the request or claim.

Please share as needed within your units. Thank you for your attention to this matter.