

### **GENERAL TRAVEL CRITERIA**

All institutional travel (excludes funded research travel, professional development travel, and travel within Edmonton) must satisfy the following criteria:

1. Travel must typically be budgeted for and approved by the Budget Steering Committee, the Board Finance Committee, and the Board.
2. A travel request form must be completed and approved by a Budget Control Officer (BCO) and the President prior to booking a trip. For international travel approved by a BCO, the travel request form must be submitted to the VP Research and International for further review and approval prior to submitting it to the President.
3. Staff and faculty who are travelling are expected to share information with relevant individuals and groups upon their return, and are required to submit a brief travel report to the president.

The forms below are available for your use at this location: G:\Information for Faculty and Staff\Financial.

- Travel request form 2017
- Travel report form 2017

### **AIRLINE BOOKINGS**

As Concordia's agreement with Uniglobe is currently under review, you may book your travel and then upon your return, request reimbursement using an expense claim form for expenses which you have paid for personally; or by requesting a travel advance to book your trip. If you have a corporate master card, you are encouraged to use it for airline bookings. All travel expense claims and travel advance requests should be appropriately approved by BCOs. Approved travel request forms must be attached to all relevant paperwork that you submit to the business office for payment processing (master card statements, travel expense claims, or travel advance forms). Concordia reimburses for the cost of economy class airfare, when airfare is seen as the most cost effective travel option and when the travel claimed is the most direct travel route. However, the following exceptions apply:

1. Staff and faculty may book business class if travel is related to professional development (PD); your PD account is adequately funded to pay for the booking; and, the booking involves at least eight hours of direct flying time. For staff, only the BCO's approval is required, however, for faculty, both the BCO's and the VPA's approvals are required.
2. Staff and faculty may also book business class for institutional travel if they have at least eight hours of direct flying time. Employees wishing to fly business class on institutional business are advised to consult their BCOs prior to requesting travel from the President.

Travel using employee's accumulated frequent flyer points is not reimbursed by Concordia. The current employee benefits plan includes medical insurance coverage worldwide, so additional medical insurance is not normally needed. Concordia does not reimburse for cancellation insurance or excess baggage fees.

## **VEHICLE RENTALS**

If you rent a vehicle, Concordia will reimburse for the cost of a full-size car or smaller unless prior arrangements have been made with your dean or supervisor. Concordia will not reimburse rental of luxury vehicles. As a member of the Canadian Association of University Business Officers (CAUBO), we have member discounts on car rentals ([www.caubo.ca](http://www.caubo.ca)). Concordia also has an agreement with Enterprise (which also includes National Car Rental) for reduced corporate rates on vehicles rented by Concordia staff for either business or personal use. Our contract number is XVC5010 and the password is BUS. Visit [www.enterpriserentacar.ca](http://www.enterpriserentacar.ca) or [www.nationalcar.ca](http://www.nationalcar.ca) for more information. Please compare rates between rental companies and choose the lowest cost option. You will need to pay for the car rental with a credit card and submit original receipts and car rental return form for reimbursement. Please ensure that you return the rental vehicle to the rental agency with a full tank of gas. Concordia will not reimburse for fuel charges assessed if a vehicle has been returned without being refueled. Concordia carries insurance to cover “non-owned vehicles” that are rented for corporate business, so you do not need to choose the additional insurance option on your rental. You can obtain specific insurance information from the Financial Administrator (G210/ext. 204/email: [mimi.kanjadza@concordia.ab.ca](mailto:mimi.kanjadza@concordia.ab.ca)).

As soon as possible upon your return, please submit your expense claim, accompanied by original detailed receipts (not just your credit card receipt) and boarding passes (if claiming for airfare reimbursement), to your reporting BCO for approval to obtain reimbursement. You may request a travel expense advance for travel expenses prior to taking your trip. As soon as possible upon your return, original receipts and an accounting of all travel expenditures are to be itemized and signed off by you and your reporting BCO and then submitted to Account Services with an expense claim request for additional expenses (or with your cheque to reimburse Concordia for unused travel funds).

The forms below are available for your use at this location: G:\Information for Faculty and Staff\Financial.

- Travel expense claim form
- Travel advance form

## **PRIVATE AUTOMOBILE AND MILEAGE**

Reimbursement may be claimed for approved travel on Concordia business using a personal vehicle. The mileage rate for Concordia-related travel is \$0.46 per km up to a maximum 600 kms round trip. Extenuating circumstances will be considered for you to use your personal vehicle for a round trip of more than 600 km, but each such travel request must be approved in advance by your reporting BCO. You will be reimbursed at the \$0.46 per kilometer rate to a maximum that does not exceed a reasonable rate for public transportation (e.g., air fare). This reimbursement includes all expenses incurred by the operator in using a personal vehicle (e.g., gas, wear and tear and insurance). Precisely, costs associated with regular inspections, repairs and modifications are the responsibility of the employee and will not be reimbursed by the University. It is the University’s expectation that a personal vehicle used while on University business be properly insured, registered and inspected. The University is neither responsible for reimbursing GPS expenses nor deductible amounts related to insurance coverage for employees’ personal vehicles. For allowable reimbursements, submit an expense claim, supported by itemized dates and distances, to your reporting BCO. Note Concordia does not reimburse for normal travel to or from your home and work.

When travelling, use the least expensive option. Use of a Concordia vehicle (if available and if you are an authorized driver), public transportation, or rental vehicle is recommended if these are more cost effective options. To be included as an authorized driver on a Concordia vehicle, please complete the forms listed below, and submit them to the Financial Administrator, together with a copy of your driver’s license:

- Driver abstract consent form
- Vehicle registration form