



REIMBURSEMENT OF EXPENSES REQUEST AND TRAVEL EXPENSE GUIDE

Making the Shift Inc.
York University
631 Kaneff Tower
4700 Keele Street
Toronto, ON M3J 1P3

Claimant's Name	First Name	Last Name		
Contact Details	Phone (optional)	Email (mandatory)		
Claimant's Mailing Address	Apt/Street Address			
	City	Province/State	Postal Code/Zip	Country
Preferred Method of Reimbursement	Cheque <input type="checkbox"/> Direct Deposit <input type="checkbox"/> Please see travel expense guide for information required for direct deposit.			

Purpose of Expenses	
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	Expenses Description <i>Receipt description (e.g. airfare, hotel, taxi, car rental, etc.)</i>	Currency <i>e.g. CAD</i>	Amount	Original Receipt Attached <i>Yes/No</i>
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Traveler's Expense Reimbursement Guide

This guide summarizes how travelers will be reimbursed for travel expenses incurred while traveling on behalf of MtS.

According to Tri-Council Agency's updated policy, all travel and travel-related subsistence expenditures must be claimed in accordance with the administering institution's relevant policies and processes. MtS is following Tri-Council and York University's travel and travel-related subsistence policy.

Airfare/Train

Visitors may be reimbursed for the most direct and economical mode of travel available, considering all the circumstances. Normally, Standard Economy airfare is preferred. Economy Flex would require further justification, per our York University's policy. This policy aligns with Tri-Agency (NSERC, SSHRC, CIHR) rules which require travelers to select the lowest airfare available.

Travel agency booking fees and trip cancellation insurance are eligible for reimbursement. Change fees and travel cancellation are normally not eligible expenses but are considered on a case-by-case basis and must be pre-approved. Seat selection reimbursement is limited to \$50+tax for flights within North America and \$75+tax for other flights. MtS does not reimburse for travel paid with loyalty points.

Travelers are encouraged to book their airfare in advance to take advantage of favourable prices and schedule. When traveling by train is the most economical mode of travel, claimed amount shall not exceed the cost of a standard economy airfare. Business class train fare would require quote for standard economy airfare obtained before travel commenced indicating it was still more economical taking a business class train ride.

Car Rental/Use of Personal Vehicle

When renting a vehicle, the standard is a mid-size car. Vehicles other than the standard vehicle would have to be supported by a detailed justification. Fuel expense for rented vehicles is an eligible expense.

Mileage allowance for use of a personal vehicle is \$.45/km. A Mileage Log with from/to addresses must accompany each claim for mileage. Our expense processing system automatically calculates kilometres using Google map. Driving a personal vehicle for 1000km or longer distances would require a quote for standard economy airfare obtained before travel commenced, indicating it was more economical travel by car.

Accommodation

Reimbursement is limited to a standard room. Travelers may be reimbursed for reasonable accommodation expenses, considering all of the circumstances. Where accommodation is provided privately (e.g. in a private residence), MtS will reimburse \$15 gratuitous amount per night.

Only those traveling from out of town* may be eligible for overnight accommodation within the Greater Toronto Area.

Meals

Visitors traveling from outside of Toronto and Greater Toronto Area shall be reimbursed for meals up to the follows (without receipts):

- breakfast CAD 12.00
- lunch CAD 17.00
- dinner CAD 36.00

Only those traveling from out of town* may be eligible for overnight accommodation within the Greater Toronto Area.

*GTA -Toronto and the regions of Durham, Halton, Peel, and York

Visitors from the United States are treated the same way as out-of-town visitors mentioned above and can claim per diem up to \$65 and other travel related expenses as well. While amounts for per diem are the same, the currency would change depending on **where the per diem was incurred**. Per diem will be CAD for traveling within Canadian borders and in USD for per diem incurred on the USA soil (e.g. at the airport).

Taxi (including Uber and Lyft)

Visitors can claim taxi and public transportation expenses incurred in order to attend MtS events/meetings.

Parking

Parking is an eligible expense.

Acceptable Documentation

The receipt shall demonstrate purchase description and that payment of the receipt has been made by the claimant. This will typically be apparent on most receipts by some notation such as “paid “or a line showing the amount paid. Where it is not evident that payment has occurred, then the claimant would need to provide further documentation such as a credit card slip, credit card statement, or cancelled cheque. However, note that this proof of payment would be in addition to the original receipt.

Kindly be advised that credit card statements/slips are not sufficient on their own and can only be used in addition to the detailed receipt.

Reimbursement Payment Method

We will process the claim on your behalf. Method of payment would be as follows:

- Visitors from within Canada will be reimbursed in CAD, either by cheque or via direct deposit to their bank account. Direct deposit might be preferred because it's done twice a week while Canadian cheques are being issued only twice a month (plus 5 business days in the mail).
- Visitors from the United States are reimbursed in USD by cheque (the only method of payment at present time). US cheques are issued every week.

Any expenses US visitors incurred in CAD will be converted into USD for payment purposes. Our expense system does the conversion automatically.

Direct Deposit – Required Paperwork

If you prefer to receive reimbursement of expenses via direct deposit, kindly attach the following to your application package:

1. Copy of void cheque (or letter from financial institution confirming account information)
2. Signed direct deposit application form (see link below). We use same form York University uses for its employees and visitors. Please skip the employee ID field.

<https://www.yorku.ca/finance/documents/EmployeeDirectDeposit.pdf>

Application Package

Kindly submit your application within two weeks from travel end date with the following:

- Original detailed receipts.
- Reimbursement of expenses request form
- Direct deposit information mentioned above (optional)

Address:

Making the Shift Inc.,
Attention: Anna Jacob/Teresa Gerner
York University
631 Kaneff Tower
4700 Keele Street
Toronto, ON M3J 1P3

For questions, please contact Anna Jacob at adjacob@yorku.ca.