

The expense reimbursement process is for **out-of-pocket incidental expenses**.

Tips for incurring/submitting an expense claim

Use the University's preferred payment options to purchase goods and services

- Apply to use a [Corporate Purchasing Card \(PCard\)](#) or inquire with your supervisor about using their PCard.
- Use [SupplyNet](#), the University's preferred method for purchasing goods and services.

Limit the use of personal funds

- Using a personal credit card for university expenses will delay reimbursement until the claim is reviewed and you may incur interest charges.
- If personal funds are used, provide written justification to support why the university's preferred payment methods could not be used. The business purpose should also be included.

Limit claim amounts to \$500

- The maximum reimbursement for a single receipt for goods and services is \$500 CAD. Claims exceeding the maximum may not be reimbursed.
- Any receipt over \$100 CAD should be submitted within 90 days or by the fiscal year-end (March 31).
- The minimum expense claim total is \$100. Expenses under \$100 will not be reimbursed unless 90 days have passed OR by fiscal year end (March 31), whichever comes first.

Submit expenses in the same fiscal year

- All receipts need to be submitted in the fiscal year (April 1 to March 31) in which the expense was incurred. Late submission may result in your claim being denied.

Ensure you have supporting documentation

- PDFs are the preferred format for supporting documentation.
- Ensure all foreign receipts are translated into English.
- Expenses without proper receipts may be deemed non-reimbursable. Attach original itemized receipts, including the vendor's name, date, the item(s) purchased, the total price paid, including GST if applicable, the payment method (cash, debit, credit). Email confirmation for any receipts are also acceptable if they show details such as the item purchased and date of purchase.
- If a vendor invoice is attached to the claim reflecting a balance owing, **proof of payment** is also required (e.g., a redacted credit card or bank statement).
- For **hospitality/working session expenses**, include the names of the attendees; purpose and date of the event; cost of alcohol/person (hospitality); total cost/person (working session and committee meetings). Refer to the [hospitality, working sessions/committee guidelines](#) for more information.

Comply with UAPPOL when using research funding

- Ensure submitted expenses are within the budget of the research project and compliant with [UAPPOL](#). Attach letter or agreement from sponsor for expenses that the U of A deems ineligible.