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**Travel Expense Claim**

Procedure No.:	2005-PR1
Policy Reference:	2005
Category:	Finance
Department Responsible:	Financial Services
Current Approved Date:	2015 Feb 23

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**Objectives**

This procedure applies directly to Policy 2005, Travel and Professional Development Expense Reimbursement. These procedures apply to expenses incurred out of pocket directly by, or on behalf of, the employee or traveller as well as those incurred using a BCIT purchasing card. It describes the requirements for:

- Making travel arrangements
- Obtaining authorization to travel
- Defining travel claim receipts and vouchers
- Receiving reimbursement for out-of-pocket expenses

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**Who This Procedure Applies To**

This procedure applies to BCIT employees who incur work-related travel and professional development expenses. This procedure also applies to students and Board members who incur travel expenses while on Institute business.

**Travel Arrangements Procedures**

Travel should be avoided where cost efficient alternative are appropriate and available. Virtual presence, teleconferencing, and other remote meeting solutions are to be considered for every travel situation and if not used, the reason is to be documented. Ideally, a single employee will attend any conference or event and then share his/her experience with colleagues. Where multiple employees attend the same event, the total planned conferences costs must be approved by the area's respective Vice President.

**1. Request for Approval to Travel**

As required by Policy 7140, Travel – Risk and Security, travellers must complete a Request for Approval to Travel form (FIN-23) for all business related travel including professional development travel outside of Metro Vancouver and the Fraser Valley. This includes travel that does not result in any expense for BCIT

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(i.e., paid for by a third party). Travellers are to submit their completed form FIN-23 to their designated signing authority and ensure the form is forwarded to Safety, Security and Emergency Management for review and approval. If a travel advance is requested, this should be done at least fifteen (15) business days prior to travel. If no travel advance is requested, the form should be submitted to Safety, Security and Emergency Management at least four (4) days in advance. This form must be completed and approved prior to making travel arrangements. A detailed estimate of all travel related costs must be included on the form regardless of whether or not a travel advance is requested. If there is no cost to BCIT, please indicate so on the form.

### 2. Advance for Travel

Employees may obtain an advance for travel for amounts of \$400 or more. The request is made by checking the appropriate field on the Request for Approval to Travel form (FIN-23.) The form must be approved by the traveller's designated signing authority and forwarded to Safety, Security and Emergency Management at least fifteen (15) business days prior to travel per Policy 7140, Travel - Risk and Security. Please note, advances will not be provided for tuition or for the purchase of goods or services for professional development. BCIT will make payment directly for tuition or registration by completing the Registration/Membership Form (FIN-113).

Financial Services will supply the advance funds within ten (10) business days prior to the start of the trip. The funds are directly deposited into the traveller's bank account if the traveller is set up for payroll direct deposit. Advances will not be given after travel has commenced. Note that travellers must submit their expenses within thirty (30) days of their return. Claims not submitted within thirty (30) days may result in the funds being deducted from the traveller's future payroll.

### 3. Making Travel Arrangements

Please note, for travel outside of Metro Vancouver and the Fraser Valley, the Request for Approval to Travel form (FIN-23) must be completed prior to booking any travel arrangement and before travel occurs.

#### 3.1. Air Travel

BCIT has contracted with a travel agency to book travel arrangements and to retain copies of travel itineraries for all BCIT travellers. All work related travel including PD must be booked through BCIT's contracted travel agent.

Should a traveler wish to combine personal travel before, during or after the business travel, this must be indicated on the Request for Approval to Travel form (FIN-23). Reimbursement of airfare will reflect the most economical cost to fly to the business destination and back. A quote for this can be obtained from BCIT's contracted travel agent and should be attached to the request form before it is submitted for approval.

##### 3.1.1 Class of Air Travel

Air travel is to be booked in Economy class. Exceptions are noted in the table below, based on destination, length of flight, and approval in advance of travel.

## Travel Arrangements Procedures

**Table 1 – Class of Air Travel**

North America	Air Travel	Flights
Travelling Inside	Economy Class	Under eight (8) hours
Travelling Outside	Economy Class	Under eight (8) hours
Travelling Outside	Business Class	Over eight (8) hours (may be allowed with manager's approval)

**Note:** Generally, flight segments separated by layovers under two hours are considered one flight although exceptions will be considered based on circumstances.

### 3.2. Travel by Motor Vehicle

#### 3.2.1 Use of Personal Motor Vehicle

BCIT will reimburse travellers for use of their personal motor vehicles for travel on Institute business including professional development. BCIT's per-kilometre reimbursement rate is based on that set by the Treasury Board of Canada and is shown in Guideline 2005-GU-1, Travel and Per Diem Rates, associated with this procedure. Note: The rate is intended to cover vehicle operating costs, such as insurance, vehicle depreciation, regular maintenance costs, and fuel.

To receive reimbursement for the use of a personal motor vehicle, the traveller completes the Mileage and Parking Expense Reimbursement form (FIN-152), showing dates of travel, destinations, and reasons for the trips.

Travellers are required to obtain approval from their designated signing authority in advance of travel in order to use a personal motor vehicle for travel outside of Metro Vancouver and the Fraser Valley. In those instances where travel would have otherwise been by air, BCIT will reimburse the traveller the lesser of the actual mileage or the quoted economy airfare to the destination plus airport parking or taxi to and from the airport. A quote for airfare from BCIT's contracted travel provider must be submitted with the Request for Approval to Travel form (FIN-23) before it is approved to ensure the most economical mode of travel is being used.

Travellers are responsible for ensuring that their vehicles have the appropriate insurance coverage. For access to a more detailed explanation of insurance coverage, refer to the Supply management website, under "Acquiring Goods and Services". No reimbursement will be made for personal auto insurance coverage.

The traveller may find that in certain situations, it is more cost-effective to rent a vehicle rather than use one's personal vehicle. Travellers are required to obtain approval from their designated signing authority in advance of travel in order to rent a vehicle. Details of the proposed rental should be included on the Request for Approval to Travel form (FIN-23).

#### 3.2.2 Rental Cars

Depending on the proximity of the airport to the hotel and/or event, it may be more economical to rent a vehicle rather than incur charges for a taxi to and from the airport. If a rental car will be used, it must be included on the Request for Approval to Travel form (FIN-23) and accompanied by a quote for comparative taxi fares from the airport to the hotel/event. Please note, no reimbursement will be issued for personal mileage, insurance

## Travel Arrangements Procedures

other than collision, GPS, or other personal expenses.

### 3.3. Accommodation

#### 3.3.1 Finding Cost Effective Accommodation

Accommodations should be booked through BCIT's contracted travel agent. The institute will consider expense claims for alternative hotel accommodation as recommended by the housing organization for an event, conference or seminar provided the rates are better than those offered through BCIT's contracted travel agent. An estimate of hotel costs should be included on the Request for Approval to Travel form (FIN-23) before it is submitted for approval. Reimbursement will not normally be provided for accommodations for attendance at events within Metro Vancouver and the Fraser Valley. Requests for accommodations within Metro Vancouver and the Fraser Valley must be approved by the VP, Administration and CFO prior to the event.

## 4. Insurance Coverage

### 4.1. General Liability Insurance (excluding auto)

Employees are covered by the Institute's general liability insurance policy when travelling on Institute business. They must complete the Request for Approval to Travel form (FIN-23), so that the approved travel is documented.

### 4.2. Medical Insurance

Employees are responsible for staying informed of their coverage. BCIT's extended health plan may provide medical insurance when travelling outside of B.C. Please contact BCIT Human Resources or BCIT's extended health care service provider to confirm your eligibility before travelling (<http://www.bcit.ca/hr/services/benefits/travel.shtml>)

## Travel and Professional Development Claim Procedure

Financial Services, Accounts Payable Travel, aims to process claims for travel and professional development (PD) related expenses within twenty-one (21) calendar days after receipt by Financial Services. Financial Services is responsible for the administration of these procedures and is authorized to question any claim and obtain further information if necessary. Please be aware that during peak periods, the time to process claims may increase to thirty (30) calendar days.

Financial Services will return the Travel Expense claim form in its entirety if the documentation or information provided does not comply with the procedures. This could possibly impact the twenty-one (21) calendar day processing time. Both claimant and designated signing authority will be notified if the claim is being returned.

The claimant must submit expense claims within thirty (30) calendar days of the end of travel. For those claimants who have received a travel advance, if the claim is not submitted within thirty (30) calendar days, the advance may be deducted from the claimant's payroll as indicated on form FIN-23, Request for Approval to Travel.

See table "Reimbursable Travel Expenses", in Appendix A, for a list of example expenses that are acceptable, and those that are not.

## Travel and Professional Development Claim Procedure

### 1. Receipts and Payment Vouchers

#### 1.1. Original Receipts and Supporting Documentation

Financial Services will reimburse travellers for expenses based on original receipts. Original receipts may include printed or hand written receipts issued by the vendor as well as online receipts (e.g., course registration). All claims for reimbursement will be matched to the Request for Approval to Travel form (FIN-23).

As explained in Policy 2005, the receipts must be detailed and itemized, including:

- Date of Purchase
- Method of Payment (e.g. cash, personal cheque, debit, or credit card)
- Description and cost of item(s) purchased
- Vendor's name and applicable contact information (e.g. address, phone number, website).

When the method of payment is not recorded on the detailed receipt, the payment voucher (which shows the method of payment) must be attached to the receipt. See section 2 Payment Method below.

Note: When submitting receipts printed in a language other than English, please provide the English translation on the receipt.

For tuition, course registrations and conferences, documentation submitted with the claim should include a receipt with cost, itinerary or course description, date of course and method of payment.

#### 1.2. Declaration for Missing Receipts

Employees are responsible for keeping original receipts if they intend to submit an expense claim. If a receipt is missing, the employee should make every effort to obtain a duplicate receipt from the vendor. Employees may generate and sign a Travel Claim Receipt Declaration form (FIN-156). The declaration states the date the expense was incurred, that the original receipt has been lost, and that reimbursement for these expenses will not be claimed from any other source. The form is available on the BCIT Financial Service web-page under Forms.

#### 1.3. When Original Receipt is Required by Employee

For warranty purposes only or when expenses are partially covered by another organization that must have the original receipts(s), the employee may request that the original receipt(s) be returned.

In this circumstance the employee is to include the original receipt(s) with their claim for reimbursement, indicating the amount to be reimbursed and a request for Accounts Payable to return the original receipt after processing. Accounts Payable stamps the original receipt(s), indicating the amount to be reimbursed by BCIT, and retains a photocopy with the claim. The original receipt is then returned to the employee.

### 2. Payment Method Must Be Indicated For All Expenses Claimed

#### 2.1. Payment by Credit Card

For expense items where a credit card was used to pay the bill, the following are acceptable to

## Travel and Professional Development Claim Procedure

demonstrate method of payment:

- Detailed receipt which shows payment was made by credit card and includes credit card type. For payments made by Visa (card starts with a 4), the last four digits of the card number need to be provided on the receipt.
- A credit card voucher which shows the last four digits of the card number accompanying the detailed receipt.
- A copy of a credit card statement with the charge listed may be used to demonstrate method of payment if either of the two options listed above is not available. The detailed receipt is still required. We ask that you please hide credit card statement details unrelated to the transaction being claimed.

### 2.2. Payment by Cash, Debit Card, Debit Credit Card or Cheque

When cash, debit card, or personal cheque is used to pay for expenses, the employee submits all relevant expense receipts. Original, detailed receipts are required, showing vendor name, date of transaction and amount. Receipts must indicate cash, debit or cheque was used as payment.

## 3. Claims for Transportation Expenses

### 3.1. Air Travel

Original invoice from BCIT's contracted travel agency must accompany the claim for reimbursement. Invoice must show the cost of the airfare and method of payment (see Section 2 Payment Method above).

### 3.2. Travel by Motor Vehicle

#### 3.2.1 Personal Motor Vehicle – Reimbursable Kilometres

When filling out the mileage form (Mileage and Parking Expense Reimbursement, FIN 152), employees count the kilometres travelled according to Table 2, following. Standard distances between BCIT campuses are given in the table in Appendix B of this procedure, and in the associated Guideline 2005-GU-1, Mileage and Per Diem Rates. Other parameters of completing the mileage form are shown in the table below. Please note, for travel outside of Metro Vancouver and the Fraser Valley, the Request for Approval to Travel form (FIN-23) must be completed prior to travel.

**Table 2 for Submitting and Calculating Reimbursable Kilometres**

Home	Regular worksite	Cannot be claimed
Home – Call Out (outside of normal working hours)	Worksite(s)	Traveller claims
Home	Alternate Worksite/Business Meeting/Trip	Traveller claims the lesser of the actual distance travelled from home or the distance from their regular worksite to destination
Home	Airport on approved travel	Traveller claims
Campus	Campus	Traveller claims
Campus	Within Campus	Cannot be claimed

## Travel and Professional Development Claim Procedure

School of Health – Nursing Dept. – Campus	Health Units	Traveller claims and indicates in the Notes column the number of Health Unit visits
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### The following motor vehicle-related costs are not reimbursed:

- Fines related to parking and traffic
- Costs incurred by an employee as a result of a collision, or other physical damage to the vehicle
- Increases to premiums on a driver's license, insurance costs, deductibles, etc.
- Employees travelling in an automobile as passengers (not in their own vehicle) may not claim for kilometres travelled
- Gas receipts will not be accepted as a reimbursable item except for a rental car.

### 3.2.2 Motor Vehicle Rental Expenses

BCIT will reimburse travellers for rental vehicle costs based on the expense receipt and credit card voucher submitted with the travel expense claim. Travellers submit the original auto rental agreement and the method of payment to be reimbursed for auto rental expenses. Fuel costs and collision insurance for the rental vehicle will be reimbursed if the original receipt is provided. Please note, additional personal expenses (i.e. GPS, personal accident insurance) are not reimbursable.

## 4. Other Transportation-Related Expenses

Original receipts showing method of payment are required for reimbursement for miscellaneous transportation expenses, including: road tolls, taxis, parking, ferries, airport transportation and airport parking.

### 4.1. Parking Expenses

For parking meters that do not dispense receipts, employees may complete the Mileage and Parking Expense Reimbursement form FIN-152, showing the out-of-pocket expense. When a parking receipt is issued, the traveller is to attach such receipts

## 5. Claims for Accommodation Expenses

BCIT will reimburse travellers for accommodation based on the original receipt showing method of payment. The amount for reimbursement must be included in the estimated travel costs provided on the Request for Approval to Travel form (FIN-23)

### 5.1. Extra Accommodation and Per Diem

BCIT may reimburse a traveller for extra night(s) of accommodation and meal(s) provided that savings in overall travel costs can be demonstrated. This may occur, for example, if a flight taken the following day is less expensive than the cost of the extra night of accommodation and meals.

### 5.2. Private Accommodation

Travellers may claim a per day amount when staying with a friend or relative who provides private accommodation. No receipt is required; the traveller states on the Travel Expense Claim form who provided the private accommodation. The reimbursable rate per night applies to the portion of the stay that relates to Institute business; the rate is shown in Guideline 2005-GU1, Travel and Per Diem Rates. Employees must indicate the number of nights on the Travel Expense Claim form.

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### 6. Per Diem and Business Associates Vouchers

Expenses must be claimed for the day they were incurred.

#### 6.1. Per Diem

Receipts for meals are no longer required. These expenses are claimed by using the established rate for the applicable meal(s) based on the per diem shown in Guideline 2005-GU1, Travel and Per Diem Rates. All per diems must be related to Institute business.

The per diem/day allowance must be adjusted for any meals already provided by others (e.g. airline meals, seminar/convention, hotel). Please contact the event planner in advance for any dietary concerns or restrictions.

BCIT reimburses the per diem rate established by the Government of Canada Treasury Board for foreign travel. If the Treasury Board rate of another country after conversion is less than the BCIT daily per diem, the Institute's per diem will be accepted. Please note, incidental allowance is intended to cover minor expenses incurred as a result of travel that are not covered under any other part of this procedure.

Employees calculate conversion to Canadian dollars by either a documented rate, such as the rate charged on a credit card bill, or a currency exchange document obtained while travelling or through the Bank of Canada website.

### 7. Hospitality Expenses

Employees may claim entertainment expenses for business associates or other guests as authorized by the employee's designated signing authority in advance. Please refer to BCIT's Hospitality and Employee Appreciation Guidelines in determining eligible business expenses. Original itemized receipts showing method of payment must be included with all claims.

### 8. Students' Expenses

A student on Institute business will be reimbursed for materials that are incurred for a project, for travelling on a field trip, or to a trade show or convention. Travel advances will not be provided to students. The request for reimbursement must be accompanied by original receipts which includes method of payment. A Request for Approval to Travel form (FIN-23) must be completed on behalf of the students by the instructor prior to any travelling outside of the Metro Vancouver and the Fraser Valley area as per Policy 7140, Travel – Risk and Security.

### 9. Family Members and Travel

BCIT will not reimburse the traveller for additional expenses incurred for a spouse or family to accompany the traveller. Original receipts must show the breakdown of the employee's individual cost(s).

### 10. Personal Travel Combined with Business Travel

Should a traveller wish to combine personal travel before, during or after the business travel, reimbursement will reflect the business-related costs only; that is, costs for the most direct or cost-effective route for the business travel. A quote for airfare from BCIT's contracted travel provider is required to ensure the more economical mode of travel is being used. Personal travel must be disclosed



## Travel and Professional Development Claim Procedure

on the Request for Approval to Travel form (FIN-23).

### 11. Conference and Registration Fees

The conference/seminar brochure or itinerary/schedule must accompany the claim for reimbursement. An employee may choose from either payment option below:

#### 11.1. Employee Pays

The Institute will reimburse employees for any registrations, conferences and staff training fees. Pre-approval must be obtained from the designated signing authority. If payment was made either electronically or by personal credit card, the employee must ensure that the invoice contains the organization's name, address, phone number and/or web address, date, description of the fees, and method of payment. Please see Section 2 – Payment Method for additional details.

#### 11.2. Institute Pays

On behalf of the employee, payment may be made directly for registration, conference and staff training fees using the Registration/Membership form (FIN-113). The original application/invoice must be attached.

For electronic registrations and renewals, the employee attaches the print-out of the electronic confirmation to the form showing the vendor's complete contact information, amount paid and item description(s).

Please note, Financial Services is not responsible for registering and/or renewing memberships. This is the responsibility of the employee. Accounts Payable will send a copy of the application/invoice along with payment to the organization for clarification.

#### 11.3. Purchasing Card

Payments for registration, conference and training fees may be made directly using a BCIT purchasing card so long as it does not exceed the card's single transaction limit. Please note, a traveller cannot approve p-card transactions related to their own travel. Information about the commercial card program can be found at <http://www.bcit.ca/supply/goods/selfserve.shtml>

If a traveller uses another employee's BCIT purchasing card for any of the travel costs, it must be noted on the Request for Approval to Travel Form (FIN-23). The cardholder is responsible for ensuring original receipts are available and submitted with the monthly card reconciliation.

### 12. Authorization for Travel Claims

#### 12.1. When Travel is Charged to Department Budgets

The designated signing authority who approves travel and professional development is responsible for ensuring that claims for expenses are in accordance with this procedure and are for Institute purposes only.

The claimant's designated signing authority signs the Travel & Professional Development Expense Claim form (FIN-21) as approval after reviewing the claimant's signed claim form and attached supporting documentation. The approval matrix is shown following.

## Travel and Professional Development Claim Procedure

**Table 3 for Travel Claim Authorization**

Claimant	Signing Authority
Members, Board of Governors	Board Chair or Vice-Chair, and President
President	Board Chair or Vice-Chair, and VP, Administration and CFO
Vice President (other than VP, Administration and CFO), others reporting to the President and Executive Board secretary	VP, Administration and CFO
VP, Administration and CFO	President or designate
Associate Vice Presidents, Deans and Directors	Vice President
Associate Deans and Managers	Dean or Director
Program and Department Heads	Associate Dean or designate
All other employees (faculty, instructors, staff)	Designated signing authority

### 12.2. When Travel is Charged to Professional Development Funds

For travel claims charged to professional development (PD) funds, the signing authority is the committee Chair or Coordinator responsible for administering the PD budget.

The claimant and the designated signing authority are responsible for ensuring that the approval to travel is completed and signed off by the traveller's department and that related claims for expenses are in accordance with this procedure and are for Institute purpose only.

## Appendix A: Reimbursable Travel and Other Expenses

Expense	Reimbursable Yes/No	Comments
Telephone calls to traveller's immediate family (10 minutes each day, unless specified by collective agreement)	Yes	
Internet connection for job related duties while travelling	Yes	
Courier/postage charges	Yes	
Consumable materials like booklets, printing matter/or photocopying and presentation supplies related to the travel incurred while on BCIT business	Yes	Appropriate supporting documentation must be attached (i.e. payment receipt – see Method of Payment)
Traveller's necessary hotel expenses (examples: use of hotel safe, laundry)	No	Covered by incidentals within per diem
Other goods purchased that are not related to travel or at the time of travel	No	

Expense	Reimbursable Yes/No	Comments
Traveller's credit card or bank fees and interest charges	No	
Traveller's uninsured auto loss	No	
Alcoholic beverages	No, except in certain circumstances	See Hospitality and Employee Appreciation Guidelines
Traveller's auto costs (car wash, insurance, parking or traffic fines)	No	
Traveller's expenses for failure to cancel accommodation	No, except in certain circumstances	Approval required from designated signing authority if late cancellation was requested by BCIT
Traveller's optional hotel or other charges (mini-bar, movie rental, spa, hair care, fitness or gym fee, etc.)	No	
Traveller's excess baggage fee	No	Unless for job-related purpose. Reimbursement will be provided for the first bag with proof of payment.
Traveller's child or pet care costs	No	
Trip cancellation insurance	No	
Additional medical insurance	No	
Medical insurance for an employee who will be residing outside of Canada for at least six (6) months (consecutively) in a calendar year, when on Institute business	Yes	
Lost or stolen tickets, cash, or personal property	No	
Travel Visa	Yes	
Vaccines where an employee is asked to travel to a country where vaccines are necessary to the health and safety of the employee	Yes	
Rental rooms, A/V equipment (up to \$500 max)	Yes	
Passport fees	No	

## Appendix B: Standard Distances between BCIT Campuses

The following table is used to determine travel distances between campuses.

Standard distances between BCIT campuses All Figures are in km (average distance)						
	Burnaby	ATC	DTC	BMC	GNW	AIC
Burnaby	–	18	12	13	8	17
ATC	18	–	13	23	13	18
DTC	12	13	–	11	4	28
BMC	13	23	11	–	14	29
GNW	8	13	4	14	–	23
AIC	17	18	28	29	23	–

**Burnaby (BBY)** Main BCIT campus  
3700 Willingdon Avenue  
Burnaby, BC V5G 3H2

**Downtown Campus (DTC)**  
555 Seymour Street  
Vancouver BC V6B 3H6

**Great Northern Way Campus (GNW)**  
555 Great Northern Way  
Vancouver, BC V5T 1E2

**Aerospace & Technology Centre (ATC)**  
3800 Cessna Drive  
Richmond, BC V7B 0A1

**BCIT Marine Campus (BMC)**  
265 West Esplanade Avenue  
North Vancouver, BC V7M 1A5

**Annacis Island Campus (AIC)**  
Motive Power  
1608 Cliveden Avenue  
Delta, BC V3M 6M2

### Guidelines Associated with This Procedure

Refer to the [BCIT Financial Services Policies, Procedures and Guidelines](#) webpage for the following:  
2005-GU1, Travel and Per Diem Rates

### Forms Associated With This Procedure

Refer to the [BCIT Financial Services Forms](#) webpage for the following:

- Request for Approval to Travel, FIN-23 (PDF)
- Travel & Professional Development Expense Claim form (FIN-21) (PDF)
- Mileage and Parking Expense Reimbursement, FIN-152 (PDF)
- Registration/Membership Cheque Request, FIN-113 (PDF)
- Travel Claim Receipt Declaration, FIN-156 (PDF)

### Amendment History

1. Created 2006 Feb. 21
2. Revision 1 2006 Oct. 10
3. Revision 2 2007 May 02
4. Revision 3 2007 Sep. 17
5. Revision 4 2011 Oct 01

- 6. Revision 5      2013 Jun 18
- 7. Revision 6      2015 Feb 23