

Meetings and Working Sessions Expense Procedure

<p>Classification Financial Management</p>	<p>Table of Contents</p> <p>1 Purpose 1</p> <p>2 Scope 1</p> <p>3 Definitions 1</p> <p>4 Procedure 2</p> <p>5 Parent Policy..... 3</p> <p>6 Related Procedures 3</p> <p>7 Related Information 3</p> <p>8 History 3</p>
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1 Purpose

The purpose of this procedure is to outline:

- a) the process for reimbursement of out-of-pocket expenses associated with Meetings and Working Sessions; and
- b) the specific requirements for approval of expenses associated with Meetings and Working Sessions.

2 Scope

This procedure applies to expenses associated with Meetings or Working Sessions.

3 Definitions

In this procedure:

- a) “Employee” means an individual who is engaged to work for the University under a contract of service, that is, there is an employer-employee relationship between the individual and the University. For clarity, this term includes support staff, management and professional staff, the senior administration group, researchers, and faculty members.
- b) “Meeting” means an assembly or gathering of Employees (primarily) for a purpose that supports the educational, research, or service activities of the University.
- c) “PI” means the principal investigator.
- d) “University” means the University of Calgary.
- e) “University Facilities” means all buildings and grounds, including athletic and recreational fields, owned, leased, or operated by the University of Calgary.
- f) “Working Session” means an event in which Employees gather for seminars and team-building activities.

4 Procedure

Claim for Reimbursement of Expenses

- 4.1 Employees may recover out-of-pocket expenses for Meetings and Working Sessions by submitting a completed and approved Expense Report.

Supporting Documentation

- 4.2 Detailed original receipts must be attached to support claims for reimbursement of out-of-pocket expenses or request for payment of expenses.
- 4.3 If original receipts have been lost, the Employee must provide sufficient detail to justify the expense.
- 4.4 The Employee must also include:
- the purpose of the Meeting or Working Session;
 - the names of the people in attendance;
 - any additional material relating to the Meeting or Working Session; and
 - evidence of prior approval.

Approval

- 4.5 The Authorized Approver will review the expense report to ensure that the expenses are:
- directly related to the business of the University;
 - an Allowable Expense;
 - permitted under the terms and conditions of the specific funding source; and
 - properly documented.
- 4.6 If the conditions under 4.5 have been satisfied, the Authorized Approver will approve the expense.
- 4.7 When the expense is funded from a research trust account, the following approvals are also required:
- the Employee; and
 - the PI when the Employee is not the PI; or
 - the department head/dean when the Employee is the PI.

Submission of Expense Reports

- 4.8 Once the necessary approval has been obtained, the Employee will submit the expense report with receipts and any other supporting documentation to Accounts Payable at Physical Plant 65 except under circumstances described at 4.9 and 4.10 below.
- 4.9 For expenses relating to research and trust projects using Fund 60 in the Faculties of Arts, Medicine, Veterinary Medicine, and Science, and the Schulich School of Engineering, the Employee will submit the expense report with receipts and any other supporting documentation to the research fund analyst at the following location:
- Arts: SS 548
 - Engineering: CCIT 210
 - Medicine: TRW 5th floor
 - Science: BI 570
 - Veterinary Medicine: TRW 5th floor

4.10 For expenses relating to the Faculty of Nursing – Qatar, the Employee will submit receipts and any other supporting documentation to Accounts Payable, room G12.

Allowable Expenses

4.11 Food and Beverages:

- a) The actual cost of food, beverages (excluding alcohol), and gratuities will be covered.

The expense must be supported by a receipt which includes an itemized statement and proof of payment. The Employee must write the names of individuals in attendance on the receipt.

Expenses That Are Not Allowed

4.12 Expenses related to the purchase of alcohol are not permitted.

5	Parent Policy	Hospitality and Travel Expenses Policy
6	Related Procedures	Hospitality Expense Procedure Social Events Expense Procedure Special Events Expense Procedure Travel Expense Procedure
7	Related Information	University Facilities
8	History	September 15, 2011 Approved and Effective. January 1, 2020 Editorial Revision. Updated format and links.