

Social Events Expense Procedure

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Approval Authority Associate Vice-President (Finance)	
Implementation Authority Director, Financial Operations	
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- 1 Purpose** The purpose of this procedure is to outline:
- a) the process for reimbursement of Employees for out-of-pocket expenses associated with Social Events; and
 - b) the specific requirements for approval of expenses associated with Social Events.
- 2 Scope** This procedure applies to expenses associated with Social Events.
- 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) “PI” means the principal investigator.
 - c) “Social Event” means an event organized by the University for a specific social purpose. A Social Event will be infrequent and includes events such as a department Christmas party, a team building exercise, a Retirement Event, or a staff appreciation event.
 - 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.

4 Procedure

Reimbursement of Expenses

- 4.1 Employees may recover out-of-pocket expenses for Social Events by submitting a completed and approved Expense Report.

Supporting Documentation

- 4.2 Detailed original receipts must be attached to support claims for reimbursement of expenses or a request for payment from University Funds.
- 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 Social Event;
 - the names of people in attendance;
 - any additional material relating to the Social Event; and
 - evidence of prior approval.

Approval

- 4.5 The Authorized Approver will review the claim or request for payment 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) Expenses related to food, beverages (excluding alcohol), and gratuities 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.
- b) Expenses related to the purchase of alcohol will be covered up to a limit of \$15 per person unless prohibited under the terms and conditions of the funding source.

Consumption of alcohol in or on University Facilities is subject to the Alcohol Policy.

5	Parent Policy	<u>Hospitality and Travel Expenses Policy</u>
6	Related Policies	<u>Alcohol Policy</u>
7	Related Procedures	<u>Hospitality Expense Procedure</u> <u>Meetings and Working Sessions Expense Procedure</u> <u>Special Events Expense Procedure</u> <u>Travel Expense Procedure</u>
8	Related Information	<u>University Facilities</u>
9	History	September 15, 2011 Approved and Effective. December 1, 2012 Revised s.4.11(a). January 1, 2020 Editorial Revision. Updated format and links.