



## **Extract from the Ontario Institute for Cancer Research's travel policy**

### **4.1.1 Non – Reimbursable Expenses**

Expenses of a personal nature will not be reimbursed. Such expenses include but are not limited to:

- Recreational expenses, e.g., video rentals, cost of mini-bar items;
- Personal items or entertainment;
- Personal travel;
- Fines for traffic and parking violations or towing fees;
- Alcoholic beverages unless part of approved hospitality (see section 4.8);
- Expenses incurred for accompanying friends or family

Travelers must not claim for meals/amenities that are already provided for at a conference or event.

### **4.1.2 Submission of Expense Statements**

Travelers must pay for their travel expenses and submit a signed Expense Statement to OICR for reimbursement (reference copies of the expense form are included as Appendix A: Expense Statement for Employees and Appendix B: Expense Statement for External Claimants. Note: current Expense Statement forms are available on the OICR intranet). The Expense Statement must be submitted within 30 days. All pertinent information must be completed on the Expense Statement, including the purpose of the trip, the dates, destinations and durations in each destination and the names of individuals or institutions visited. Each traveler must pay for their own expenses and seek reimbursement individually. However, it is acknowledged that this may not always be feasible. If any expenditure covers other employees or individuals, they must be clearly identified on the supporting receipts, and on the Expense Statement submitted for reimbursement.

Separate Expense Statements are required for each and every grant against which a claim is being made. For example, if a trip involved travel on OICR business, on behalf of a CIHR grant, and on behalf of an NIH grant, the Traveler is required to complete and submit three separate Expense Statements, thereby ensuring each grant has appropriate, separate claims.

Any expenses submitted for reimbursement to OICR must comply with OICR policies, regardless of whether the amount is to be subsequently reimbursed from another entity. The claimant is responsible for ensuring that reimbursement is received

Travelers must submit the following with their Expense Statements:

- Boarding pass and/or electronic ticket for air travel;
- Boarding pass and/or electronic ticket for rail travel;
- Hotel receipt;
- Vehicle rental receipt;
- Meal receipt;



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- Telephone bills;
- Receipt from a bank or foreign exchange company showing the exchange rate paid for foreign currency used to pay for travel expenses;
- Copy of credit card statement showing amount of the expense in a foreign currency and the amount charged in Canadian dollars;
- Where an official workshop or conference has been attended, the prospectus or program specifying the relevant dates.

Detailed, original receipts must be submitted with all claims. Credit card slips will not be accepted as proof of expense without the original receipts/bills from airlines, railway companies, hotel, car rental companies or restaurants. Receipts must include the name of the vendor, location, date and the amount paid (including taxes), and any other relevant information that supports the claim for the purposes of transparency and accountability.

Where the original receipt is electronic, the printed version of this qualifies as an original receipt. Missing receipts will be deemed to be of a personal nature, and will be deducted/removed from the expense claim.

Any receipts missing from a P-Card invoice will be deemed to be personal in nature, and a personal cheque for the relevant amount must be provided (payable to OICR) with submission of the P Card monthly invoice.

When airline tickets are purchased with the traveler's own credit card and payment is required prior to travel, the traveler may submit only the credit card statement and a copy of the electronic ticket with the Expense Statement for reimbursement. It is the traveler's responsibility to retain and forward their boarding passes for attachment to the Expense Statement already filed.

#### **4.2.4 Spouse/Companion Travel**

OICR will not reimburse travel expenses incurred by a spouse or other individual accompanying the traveler.

#### **4.2.6 Air Transportation**

Travel by air is permitted when this is the most practical and economical way to travel. Tickets must be purchased in advance of travel and booked for fixed dates. Open tickets may not be purchased. Permissible airfares are standard advance booking economy airfares (ex. Air Canada Tango or Flex Fares). Flex fares must only be used when there is demonstrated uncertainty related to the travel dates, thus making the flex fares the most economical choice. In the event of exceptional circumstance, any airfare exception must be pre-approved by the President and Scientific Director, or the Deputy Director and Chief Scientific Officer. All approved travel for OICR business will be reimbursed by OICR in keeping with the provisions of this policy.

If the traveler elects to travel in business or first class, then the traveler will pay the incremental cost directly to the airline or railway company with his/her own credit card.



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#### **4.2.6.1. Air Travel Reservations**

Once authorization has been received for travel, the traveler is responsible for booking transportation and accommodation in compliance with this policy.

Flights will be booked based on the lowest cost economy/coach class fare that offers the most direct routing and guaranteed seating. Travelers must use electronic tickets when they are available and should make full use of all available tools to ensure the most economical travel arrangements are booked.

Trip cancellation insurance may not be purchased unless there is a strong possibility the traveler will have to cancel the flight due to medical or personal (vulnerable family situation) reasons. The purchase of trip cancellation insurance requires pre-approval of a supervisor.

#### **4.3 Accommodation**

Accommodation will be for single accommodation in a standard room and no reimbursement will be made for suites, executive floors, concierge levels or luxury accommodation.

All expenses must be supported by the detailed receipts, showing itemized charges. Claimants must pay any personal charges (mini-bar, movies etc.) with their personal credit card, and such charges should be removed from the detailed bill. With the exception of standard room charges, internet, and taxes, all other charges on a hotel bill must be supported by detailed receipts (i.e. in hotel restaurants etc.) It is the claimant's responsibility to ensure that they obtain sufficient copies of their detailed bill(s) to support their expense claim submission. Where detailed receipts are not provided, the charge will be deemed to be personal in nature, and it must be reimbursed to OICR.

Many hotels offer shuttle services that can be booked in advance, resulting in substantially reduced costs. These should be used when available.

When booking hotel rooms, travelers must ensure that the booking is guaranteed for late arrival. Travelers are responsible for cancelling hotel rooms within the deadline stipulated by the hotel to avoid the cost of rooms not used and must notify the hotel directly of the cancellation. Travelers must request and record the cancellation number in case of billing disputes. Note that cancellation deadlines are based on the local time at the hotel.

OICR will not reimburse the cost of overnight accommodation within 24 km of the claimants' usual workplace. In exceptional or emergency situations that require an individual to remain close to the office for lengthy periods of time in excess of normal working hours, the cost of overnight accommodation within the vicinity of the office may be authorized. The authorization must be obtained in writing from the President and Scientific Director, or Deputy Director and Chief Scientific Officer, or the Chief Financial Officer. For extended stays at one location, long-term accommodation should be arranged with the approval of an immediate supervisor to take advantage of lower weekly or monthly rates.

#### **4.7 Meals While Traveling**



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The actual and reasonable cost of the traveler's meals will be reimbursed. Meal claims include taxes and gratuities.

Acceptable amounts for meal expense claims are provided in the table below. Daily total amounts differ depending on travel within Canada, the U.S. or abroad.

	Breakfast	Lunch	Dinner	Daily Max
Within Canada	\$15.00	\$20.00	\$40.00	\$75.00
Outside of Canada (In USD)	\$15.00	\$20.00	\$40.00	\$75.00

When claiming for less than a full day of meals, the specific meal amounts provided above should be referred to as guidelines. The daily limit per person, per day for all meal expense claims is the Daily Total line.

OICR will not reimburse the cost of alcoholic beverages.