



RESEARCH AND CONFERENCE TRAVEL GUIDELINES

Funding requests should be made to David Mendeloff, CSDS Director, at csds@carleton.ca. Requests must include a complete budget that reflects the funding guidelines and restrictions below. More information on application procedures follows.

Funding Guidelines and Restrictions

Eligible expenses include the following, subject to restrictions outlined below:

1. **Transportation:** Travel expenses in regular economy class as per Treasury Board guidelines (i.e.: the lowest available fare).
2. **Taxi:** Taxi rides to/from the airport/train station/bus station, to/from the hotel and to/from the conference.
3. **Conference registration fees:** Only *required* costs for participation in the conference will be covered. Optional costs, such as for conference-organized entertainment, are ineligible. Additional costs for conference-sponsored banquets or receptions must be submitted as a meal expense.
4. **Accommodations:** Only reasonable hotel room rates are eligible. The hotel name and quoted room rate should be provided with your budget in order to determine suitability before travel.
5. **Meals:** Meals taken in the context of conference participation up to the Treasury Board maximum. Alcohol expenses cannot be reimbursed.

Important Caveats

1. Only travel expenses directly related to actual conference participation can be reimbursed. If you plan to arrive earlier or stay later for personal reasons, or a conference lasts several days or more and you plan to attend the entire event, but are actively participating on only one day, we can only reimburse that portion of your hotel and other expenses that would reasonably be associated with your participation. These are usually expenses incurred on the day of your participation and either one day before or one day after. In other words, if you are presenting at a conference on only one day, we will usually cover 2 nights of accommodations and related expenses. There are exceptions to this (for example if you are presenting on the first and last day of a

conference that takes place over several days). Such details should be noted in the funding request.

2. We cannot reimburse *incidental expenses*.
3. All expenses must be accompanied by original receipts and required documentation (i.e., original boarding passes). Reimbursements cannot be made without this. If you lose an original boarding pass, for example, you will not be reimbursed for that leg of the flight. In that situation you will need to contact the airline directly for proof of travel. For meals, we must have *itemized* receipts (detailing what was purchased). No per diems will be given.

Preparing Your Funding Request

Formal funding requests should be addressed to the Director of CSDS. Reimbursements cannot be made without prior approval of the Director. The request must include:

1. A summary description of the conference and your role in the conference.
2. A copy of the official conference announcement/agenda and registration form. If there is a conference website, please provide this information as well.
3. Documentation from the conference organizers confirming your participation in the conference.
4. A title and abstract of the paper being presented.
5. A formal budget in accordance with the guidelines and restrictions above.

Note that travel advances will not be provided. You are responsible for covering your own expenses. Reasonable expenses that adhere to the funding guidelines will be reimbursed upon your return. All reimbursement requests will be closely reviewed and adjusted if necessary.

Reimbursement Procedure

Within one week of your trip, submit the following documentation to Cathleen Schmidt, DT 1423:

1. A covering letter indicating the name of the conference, paper presented, dates of participation and total amount to be reimbursed.
2. A complete, itemized expense breakdown using the attached excel template (Also available at www.carleton.ca/csds/funding). Note:
 - Expenses in foreign currency should be converted into Canadian dollars at the rate in effect at the time of each transaction. To determine the exchange rate at the time of transaction use the converter available at www.bankofcanada.ca/rates/exchange/. Alternatively, you may include a copy of your credit card statement that indicates the actual amount paid in Canadian dollars.

- Expenses must be itemized (i.e., each individual expense transaction must be indicated). Each line of the expense report should correspond to an individual receipt (with the exception of meals requests).
 - Submit both an electronic copy and hard copy of the completed expense template.
3. A Carleton University Travel Reimbursement form that includes your personal information on page 1 (only your name, address, employee/student number), and your signature ("Signature of Claimant") on page 3. Please do not fill in any other information on this form. (Forms are available from Cathleen Schmidt.)
 4. All original receipts and one set of photocopies of all original receipts. No expenses can be reimbursed without original receipts.