



## **AGE-WELL Travel Policy**

### **General Provisions**

All staff and others requesting travel reimbursement from AGE-WELL NCE must comply with this policy.

Travelers must choose the most economical and direct form of transportation while traveling for network business.

AGE-WELL has partnered with Egencia® to make network travel easier and enable centralized billing. All network members are expected to book travel directly through our travel partner when travel is subsidized by the Network Management Office. AGE-WELL staff, researchers and trainees are also welcome to take advantage of AGE-WELL's discounted rates for business travel to be paid from their project funds. Please see the *Egencia® How-To Guide* on the AGE-WELL intranet for more information about using this service.

Reimbursement for travel expenses not booked through Egencia must be handled through completion of an AGE-WELL Expense Reimbursement Form. Please see the *AGE-WELL Expense Reimbursement Policy* for more information about how to complete the form required.

### **Air Transportation**

All air transportation is managed through our travel partner Egencia®. Airfare must be booked at the lowest available fare and should not exceed full economy fare. Claims for First Class and Business Class travel are only valid for flight times greater than 9 hours in duration and must be approved by the Network Management Office in advance of booking. Seat selection<sup>1</sup>, and flight change fees are not covered by the Network Management Office. Flex fares can be booked upon prior approval from the Network Management Office

Flights must be booked a minimum of 4 weeks prior to any event. Flights booked after this period must be paid for directly by the attendee. Reimbursement for flights not booked more than 4 weeks prior to an event will be reimbursed at the average economy rate.

### **Rail/Bus Transportation**

Train ticket receipts must be submitted when traveling by rail. Travel by rail or bus may be selected by an expense claimant as an economical alternative.

### **Use of Personal Vehicles**

Expense claimants may use, on occasion, personal vehicles for AGE-WELL's business. Reimbursement will be no more than \$0.40 cents per kilometre and is subject to change.

This allowance is to cover the cost of fuel, depreciation, maintenance and insurance. It is the sole responsibility of the claimant to ensure adequate insurance coverage. If use of your personal vehicle exceeds the cost of an economy flight from your home city to the destination, you will be reimbursed the cost of an economy flight only.

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<sup>1</sup>Seat selection is available with prior approval and where flights are longer than 4 hours



Any traffic or parking breaches are the sole responsibility of the claimant and will not be reimbursed.

When calculating the total kilometres of a trip that originates from the claimant's home, the normal distance driven to the place of work should be excluded.

Parking and toll charges incurred when traveling on AGE-WELL's business may be reimbursed. Parking and toll charge receipts must be attached to the expense report.

### **Automobile Rental**

The use of rental vehicles may be authorized where this method of travel is economical and practical. All automobile rentals are managed through our travel partner Egencia®.

Rental of a compact or midsized car is permitted for all automobile rentals. Collision and liability insurance must be purchased from the rental agency.

### **Hotel Accommodation**

All expense claimants are expected to use standard accommodation. Hotel expenses are managed through our travel partner Egencia®.

The expense claimant is responsible for all additional charges to the room. The claimant is encouraged to obtain the detailed bill prior to checking out of the hotel to ensure the validity of all the charges. AGE-WELL will not reimburse for charges such as entertainment, mini-bar, and special facilities charges. The detailed hotel invoice must be attached to the expense report and must include an itemized receipt of all food charges expecting compensation.

### **Meal Allowance**

When meals are provided at the organized event, no claim for meals may be made. Meals may be reimbursed by AGE-WELL when claimants are out of town on business. They will be reimbursed at a per diem rate of not more than \$50.00 (Canadian dollars) per day if the travel is within Canada. For travel outside Canada, meals will be reimbursed at a per diem rate of not more than \$75.00 (Canadian dollars) per day.

As a guide, the \$50.00 per diem rate is based on \$10.00 for breakfast, \$15.00 for lunch and \$25.00 for dinner.

Receipts will be required to support the meal allowance claimed. A description of the meeting and participants is also required for reimbursement.

### **Alcohol**

The purchase of alcoholic beverages will not be reimbursed.



## EGENCIA® How-To Guide

AGE-WELL has partnered with Egencia® to make network travel easier and enable centralized billing. All network members are expected to book travel directly through our travel partner when travel is subsidized by the Network Management Office.

Members of the network are also welcome to take advantage of AGE-WELL's discounted rates for business travel not being subsidized. Our new travel initiative allows for arranging travel for any member of the network, if applicable. Below is a step-by-step process on how to use the booking tool.

1. Log on to your personalized page <https://www.egencia.ca>
2. Select your method of travel and/or accommodation (Air, Hotel, Car)
3. Please read any applicable broadcast message prior to booking.
4. Select your airfare, hotel or car booking
5. Select an authorized approver
6. Select the appropriate department code that applies to the trip
7. If applicable, select your institution.
8. Please input your reason for travel
9. If applicable, please input the related Project Name.
10. If applicable, select reason code for out of policy booking<sup>2</sup>
11. Payment Information
  - a. If the network is subsidizing this trip please select the AGE-WELL Corporate Card for central billing
  - b. For AGE-WELL related business travel not subsidized by the network please select alternate method of payment<sup>3</sup>


Payment information

-- Add a new card --  
AGE WELL - Corporate Card [Central Bill]  
-- Add a new card --  
Card type - [x] Don't see your card type:  
-- Select card type --  
Card number -

12. Please allow 24 hours for trip approval from our Travel Manager
13. Go to <https://www.egencia.ca/daily/enc4105/service/default.asp> for more information

### Notes:

- Traveler's insurance is not covered by the network
- Personal Travel cannot be booked through this tool
- Frequent traveler accounts can be saved on your individual profile
- Please contact [info@agewell-nce.ca](mailto:info@agewell-nce.ca) with any questions

<sup>2</sup> Please note that all bookings outside of company policy will be marked  and will require a reason code prior to confirmation of booking.

<sup>3</sup> Please note that while travel booked through this tool will need approval by a Travel Manager, regardless of method of payment, travel not centrally billed will bypass the more stringent guidelines required when using central billing.



## **AGE-WELL Expense Reimbursement Policy**

### **Completion of Reimbursement Form (when Egencia<sup>®</sup> is not used)**

The claimant must complete and sign the AGE-WELL Expense Reimbursement form and by so doing, verifies that the expense claim is accurate and in accordance with CIHR and AGE-WELL's Travel Policy.

Receipts must support each expense. It is the responsibility of the individual incurring the expense to ensure all claims are supported by adequate documentation and that the expense is appropriate.

Expense claims for traveling should be submitted within four weeks of completion of a trip. Any expenses not submitted on time may not be reimbursed and an explanation indicating reasons for the delay in submission must accompany the expense form.

A duplicate copy of the completed expense form must be retained by the claimant.

Forms must be prepared electronically. Each expense must be itemized on the expense form with the corresponding reference number written on the attached receipt. All applicable taxes must be itemized in the appropriate column on the form.

Payments will be via our host institution, University Health Network. We are obligated to use their expense reimbursement form and processes.

Please fill in:

1. Name, email, phone number, date and home address.
2. Date for each item claimed and a brief description.
3. Fill in the total amount per transaction in each column; this should include all taxes, tipsetc.
4. Fill in the tax column using the relevant rate depending on your home province (ignore the taxes if they are not applicable).
5. Please print the form and sign in the requestor signature section.

You must include the following with expense reimbursement form:

1. Itemized receipts (original or copy), numbered as per their receipt on the form.
2. Proof of payment, e.g., credit card statement (please black out personal information as needed).
3. Currency conversions, if applicable.



## FAQ

### **I need help completing the form. Who do I contact?**

Please contact [info@agewell-nce.ca](mailto:info@agewell-nce.ca) with any questions you may have.

### **Can I email the form?**

We require the completed form including signatures in order to process payment. Please send all completed reimbursement materials in a single email to [info@agewell-nce.ca](mailto:info@agewell-nce.ca).

### **Why do I need to supply a credit card statement?**

In order to ensure that reimbursement is made to the person who incurred the expenses, we require a proof of payment in the form of personal credit-card statement. If the expenses were paid for by your institution/company, please send an invoice to AGE-WELL for reimbursement. Please contact [info@agewell-nce.ca](mailto:info@agewell-nce.ca) for more information.

### **The tax section on the form states 13%, what do I do if I paid a different rate?**

Please fill in the actual amount of tax paid in the tax column, even if the percent is different to that stated on the form.

### **Can I claim mileage?**

Yes, however, prior approval is required from the Network Management Office.

### **Can I claim per diem?**

We do not typically cover per diem unless specifically negotiated/approved by the Network Management Office in advance.

### **When is my expense form due?**

Expense forms must be submitted no later than four weeks after the completion of the event and/or the purchase of the expense. Exceptions will require written approval.