

Travel Policy Q&A

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What types of travel does this policy cover?

All types of travel are covered by this policy. This includes ambulance transfers, education sessions, meetings, basically anything related to travelling on Health Centre business.

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Is there any type of travel it doesn't cover?

No. It covers all types of travel.

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What do you mean by an itemized receipt?

An itemized receipt indicates the items you purchased, the price for each item, taxes and the total amount you paid.

The itemized receipt is required to show that all employees are following the policy. The travel policy is posted on our website. By means of the *Freedom of Information and Protection of Privacy Act* (FIPPA) rules, the general public can request access to these expenses.

Also as a *Harmonized Sales Tax* (HST) contributor, the Health Centre receives a credit on part of the taxes. There are some travel expenses that have a different HST rate. An itemized receipt takes the guessing out of what credit can be claimed.

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What do I do if I didn't get a receipt?

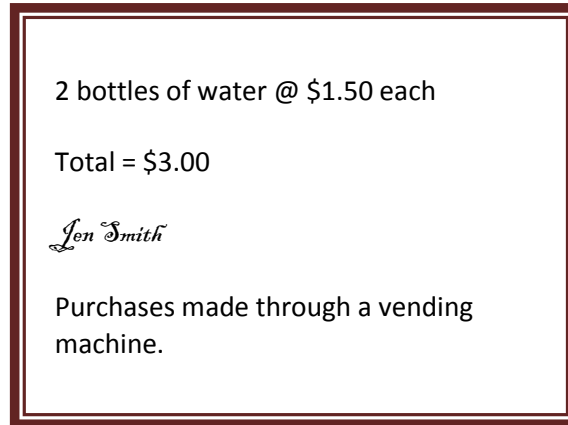
For each purchase that you did not get a receipt, you will need to write on a blank sheet of paper what you purchased (itemized), the total, your signature, and explain why the receipt is missing.

<p>2 bottles of water @ \$1.29 each 1 Chicken sandwich combo @ 5.99</p> <p>Total = \$9.68</p> <p><i>Len Smith</i></p> <p>Forgot to ask for the receipt when I went through the drive thru at Wendy's</p>
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What if I purchased something from a vending machine?

You will need to write on a blank sheet of paper what you purchased (itemized), the total, your signature, and write that you purchased the items from a vending machine.



2 bottles of water @ \$1.50 each

Total = \$3.00

Len Smith

Purchases made through a vending machine.

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How long does it take to get reimbursed?

If you submit all the required forms completed to your manager by Monday you could see the payment into your bank account as early as Friday that same week. However, if the forms are not complete or receipts are not attached, they will be returned to you for completion.

If the Finance department receives everything signed, completed and correct by Tuesday, the payment can be process Thursday and payment released to you on Friday. Vacation schedules and timing of receipt of the completed forms can cause a delay; that is why we suggest payment within three weeks.

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What forms do I have to submit?

All travel expense claims should include the following:

- A signed travel expense form (signed by both you and your manager)
- All original itemized receipts (no photocopies or visa receipts will be accepted) or written documents if receipts were not obtained.
- If this was travel for education purposes, include a copy of the approved education request form.

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Where can I find the forms to submit?

The travel expense form can be found on the intranet under PDMS and you can do a Policy Search on "Travel". In the future, a Document/Forms Search could also be done.



The most recent Travel Expense Form is what you want to choose.

You can also contact the Finance department to obtain the most recent forms as well.

The approved education request form would have been received from the Finance department directly to you or your manager. You should have received 3 copies of the approved education request. (1 for any tuition expense, 1 for your travel expense claim, and 1 for your records)

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Where can I find a copy of the Travel Policy?

The Travel Policy can be found on the intranet under PDMS by performing a Policy Search on "Travel".



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Who do I submit my forms and receipts to?

Once you have completed all the forms, sign them and give them to your manager. Your manager will then review the expenses, sign and submit it to Finance department. Your manager may sign and send it back to you. If this occurs, please ensure the Finance department received the original for payment.

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Why are tuition expenses submitted on a different form than travel expenses?

Tuition expenses are generally a single fee paid directly to the person or organization providing the educational event. Sometimes these expenses are paid using the Health Centre credit card and therefore a purchase order is required to track such expenses.

Travel expenses generally include more than one type of expense. The travel expense form summarizes these expenses and if you complete the form electronically, it will add up the columns for you as well as calculate the tax portion finance needs to separate.

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I charged my meals to my room. Is that sufficient as a receipt?

No. The hotel invoice does not provide a breakdown of the meal and an itemized receipt is required.

If you did not get the itemized receipt at the time of your meal, you can request it upon checking-out or you can call the hotel and request a copy.

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How do I claim the gratuities (tips)?

Write the amount of the gratuity on each receipt. Ensure you properly record the gratuity on the travel expense form. It is a separate item. The Health Centre does allow gratuities up to 20% of all meal costs. Anything more than that, will not be reimbursed to you.

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Can I get a receipt from a taxi cab?

Yes, all taxi cabs provide receipts. Remember to write down the amount of gratuity you provided. This gratuity amount is not included in the 20% of meal costs but it still needs to be a reasonable amount.

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The travel policy only covers one (1) alcoholic beverage. What if I want more than one?

If you purchase more than one (1) alcoholic beverage and you did not receive prior approval from Senior Management, then you will only be reimbursed for one drink.

As a note, the Ontario Government does not reimburse for any alcohol.

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Can I use my cell phone to call home or the Health Centre? Do I get reimbursed for this?

Yes. The Health Centre recognizes that you need to communicate with your immediate family and/or the Health Centre while away on business.

If you use the hotel phones, any phone charges incurred for you to call home or the Health Centre will be reimbursed. However, any charges for other uses such as making a reservation for dinner or calling a friend are not reimbursed. Please ensure you properly identify your expenses on your hotel invoice.

If you use your cell phone to call home or the Health Centre, complete a travel expense form and attach a copy of your cell phone invoice that shows the date of the call, duration of the call and the charges. The Health Center will reimburse you accordingly.

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I stayed at a friend's or family's house, can I get them anything to compensate them for the stay?

Yes. In the travel policy it is called "Gifts in Lieu". By staying at a friend's or family's home, you have likely saved the Health Centre some expenses. As a result a gift can be provided of a value no more than \$50.00 per day. This gift can include the purchase of alcohol. Please ensure you write on the back of the itemized receipt – to whom the gift is for, and what the relationship is to you. (Sister, friend, etc.)

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I traveled 6 hours to get to Toronto, then another 6 to get back home. How can I claim any of that time?

If you are travelling during your regular work hours, you are not entitled to any additional travel time. As an example, if you work Monday – Friday and you travel to Toronto on Tuesday during the day, then you will not claim any travel time.

If you are travelling over 200 km and it is during off-hours, you are entitled to half the travel time at straight time. As an example, you travel on a Sunday to Toronto and it takes you 6 hours, you can claim 3 hours of travel time. Ensure you write this time on your timesheet and your manager will code this appropriately in the scheduling program.

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I am leaving from Iron Bridge to travel to Sudbury. Can I claim my mileage to and from Iron Bridge?

No. Mileage will be reimbursed from Blind River to Sudbury and back to Blind River. The travel policy states that *“BRDHC will reimburse mileage departing from the lesser distance of BRDHC or the employee’s home.”*

If you were travelling to Sault Ste. Marie, then the mileage would be reimbursed from Iron Bridge to Sault Ste. Marie and back to Iron Bridge.

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I’m a manager, what am I supposed to look for when signing for these expenses?

As a manager, you are responsible for the expenses being charged to your department. You are signing the travel expense form indicating that you know:

1. The expenses were incurred on behalf of the Health Centre;
2. The claim has all of the required documents as per the Travel Policy; and
3. The claim is added correctly (It’s best if the form was completed on the computer to ensure the addition is done correctly, otherwise you are expected to re-add the columns to ensure it is correct.

If anything is missing or incorrect, please return it to the employee and have them correct it. Once you are satisfied the claim is accurate and correct, please sign and forward to the Finance department.

Please keep in mind that if the claim is received by Tuesday the payment could be deposited to the employee’s bank account as early as Friday, otherwise, it would have to be held until the next Friday.

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