

## Appendix A – Required Approvals & Documentation

Item	Additional Approval Required	Required Supporting Documentation
Accommodation	n/a	<ul style="list-style-type: none"> <li>• Encouraged to use discounted rates</li> <li>• Proof of stay required</li> </ul>
Accommodation stays ≥ 1 month	Pre-Approval	<ul style="list-style-type: none"> <li>• Must include email pre-approval attached to expense claim</li> </ul>
Approved Workplace Accommodation	Claimant to have an Accommodation Plan from Employee Wellness Services	<ul style="list-style-type: none"> <li>• Must attach an Accommodation Plan from Employee Wellness Services</li> </ul>
Conferences/Seminars	n/a	<ul style="list-style-type: none"> <li>• Must attach conference/seminar itinerary/agenda/syllabus with expense claim - no links allowed</li> </ul>
Course Fees	n/a	<ul style="list-style-type: none"> <li>• Must attach course itinerary and proof of successful completion of course with expense claim</li> </ul>
Dependent Care	Pre-Approval	<ul style="list-style-type: none"> <li>• Must include email pre-approval attached to expense claim</li> </ul>
Exception to Policy	Pre-approval by: Principal, or a Vice-Principal, Associate Vice-Principal, Dean, Associate Dean, Vice-Dean, Vice-Provost, University Librarian, or Associate University Librarian	<ul style="list-style-type: none"> <li>• Must include email pre-approval attached to expense claim</li> </ul>
Expense Claims - General	n/a	<ul style="list-style-type: none"> <li>• Staff, Faculty, Students - submit through the ERS</li> <li>• Visitors to use Manual Travel &amp; Expense Reimbursement Form</li> </ul>
Expense Claims - Visiting Researchers	Department Head	<ul style="list-style-type: none"> <li>• Claimant to submit non-ERS claim to <a href="mailto:expenses@queensu.ca">expenses@queensu.ca</a></li> </ul>
Late claims (>1 year)	Claimant to get exception to policy pre-approval	<ul style="list-style-type: none"> <li>• Must include email pre-approval attached to expense claim</li> </ul>
Mileage	n/a	<ul style="list-style-type: none"> <li>• Must include comments and/or attachments showing Most Economical.</li> <li>• Recommend using the Mileage Calculator within the ERS.</li> </ul>
Missing Itemized Receipt	n/a	<ul style="list-style-type: none"> <li>• Missing Receipt Affidavit must be attached. It is a legal document which only the claimant can attach.</li> </ul>

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Receipted Meals	n/a	<ul style="list-style-type: none"> <li>•Not allowed for Countries where Per Diems are required</li> <li>•Must ensure proper supporting documentation</li> <li>•Tips maximum of 20% of reimbursable amount</li> <li>•Alcohol not reimbursable</li> </ul>
Receipts	n/a	<ul style="list-style-type: none"> <li>•Claimants must ensure quality, accuracy, reliability and authenticity of receipts and scanned images.</li> <li>•Original receipts can be disposed of after payment of the claim has been received.</li> </ul>
Research-related travel	Principal Investigator (PI) or delegate. If PI is traveling, approval must be approved by the Department Head or Dean.	<ul style="list-style-type: none"> <li>•Please contact Research Accounting if unsure what is eligible</li> </ul>
Starting Point of Travel	n/a	<ul style="list-style-type: none"> <li>•Must include proof with expense claim. I.e., if University work location is closer to business travel destination but taking train from personal residence location, show costs under both distances and only claim reimbursement for whichever is the least distance/cost.</li> </ul>
Travel – Most Economical	n/a	<ul style="list-style-type: none"> <li>•Quotes must be obtained and included with the expense report and must be obtained at the same time actual travel is booked showing Most Economical</li> </ul>
Travel – Not Most Economical	Claimant to get exception to policy pre-approval	<ul style="list-style-type: none"> <li>•Must include email pre-approval attached to expense claim</li> <li>•Quotes must be obtained and included with the expense report and must be obtained at the same time actual travel is booked showing not Most Economical with an explanation as to why this travel method is chosen</li> </ul>

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Travel – to-and-from the University	n/a	<ul style="list-style-type: none"> <li>•Must include with expense claim the specific clause or section from employment agreement showing entitlement to reimbursement for travel, parking, and/or expenses to-and-from the University.</li> </ul>