



UNIVERSITY OF CALGARY

Research Accounting – Expense Claim Form

Scan form, receipts and supporting documentation and email to RTAhelp@ucalgary.ca

For assistance contact RTA Help Desk at 403-210-7900 or RTAHelp@ucalgary.ca.

- Expense Claim
- PER (Faculty Only)
- Payment Request

UCID #

Title

Last Name:

First Name:

Contact #:

Email:

Address (Payment Request Only):

Purpose: Example: Attend the conference "___" where I attended presentations and networked with students and colleagues.

Relevance: Example: Conference "___" is a gathering of brain researchers and industry representatives sharing their learnings to guide / support my research project "___"

Destination: Affiliation to Project funding: Example: Grad student working on Dr. "___"'s research

Start Date (mm-dd-yyyy): End Date (mm-dd-yyyy):

Please complete all the above fields.

Required Supporting Documents

Travel Claims:

- All Official Supporting Documents (ie. schedule or program indicating the dates of meetings, conferences or workshops)
- Details of daily claims for expenditures relating to those visits.
- Detailed Receipts (ie. hotel folio, restaurant receipts, car rental agreement, etc.)
- Proof of Payment for all receipts (if receipt is in foreign currency you must provide verification of exchange rate or accept the default Peoplesoft rate)
- Detailed Air Travel receipts and boarding passes or any other evidence that support travel expense claimed
- For Tri-Council projects, prepare a separate claim for each trip (must be from Calgary to Calgary)

Meeting Expenses:

- Names and number of attendees as well as purpose of meeting is required

Equipment & Supply Claims:

- Justification is required for items deemed personal in nature (ie. electronic equipment, field work clothing, lab supplies, etc.)

Payment Request Claims:

- Wire Payment Request Form (www.ucalgary.ca/finance/operations/ap/forms) required for international visitors
- Electronic Funds Transfer Form (www.ucalgary.ca/finance/operations/ap/forms)

Please remember to attach all required backup and documentation according to University Policy and Procedure and Sponsor Funding Terms and Conditions.

