MCMASTER RESEARCH FINANCE REQUEST FOR PAYMENT CHECKLIST FOR COMPLIANCE

Expense Information
- Ensure separate claim for each claimant for each trip
- Trip ID is identified for expenses paid for future travel (conference registrations, airfare)
- Was there previously paid expenses for this trip? If yes: Enter amount ________ and Expense/Voucher ID _______ & original Trip ID ________

Approval
- Claimant Approval. If Claimant is not in MOSAIC electronic workflow attach claimant signature in an attachment noting that he/she authorizes the expenses such as the Accounts Payable, Travel Non-Employee Expense Reimbursement Form.
- PI or Delegate Approval via MOSAIC electronic workflow
- Department Chair or Dean for grant holder’s travel claim (one-over-one) via MOSAIC electronic workflow (Purpose Approver)

Claimant Affiliation to the Research Project
- PI
- Project Manager
- Research Assistant/Associate
- Collaborator
- Undergraduate Student
- Masters Student
- PhD Student
- Guest Speaker
- Visiting Researcher
- Other (specify)

Travel purpose
- Purpose of travel clearly explaining how the travel is directly related to the grantholder's research (who, what, why, where, when and how). Examples:
  - Conference
    I, claimant attended name of conference in where from dates. The material covered directly relates to project title because it contributes to the advancement by how.
  - Fieldwork
    I, claimant conducted fieldwork in where from dates; collected what to be used in my research project project title where I am analyzing what.
  - Collaboration
    I, claimant was collaborating at the University of name on dates with Professor name; comparison of research findings related to what.

Other Travel Information
- Dates of travel
- Destinations of travel (location visited)
- Name of person visited if travel is for research collaboration or for an invited research meeting

Supporting Evidence for expenditures
- Exchange rate if travelled outside Canada or made purchases outside Canada
- Conference prospectus or program showing the location, dates and title of the conference
- Invitation or agenda if travel was for research collaboration
- Hospitality event: names of participants and indicate the external guest or visitor
- Hospitality event: number of participants
- Scanned copy of original receipts (itemized list for meals)
- Air travel and/or Land travel boarding passes if available
- Google maps if claiming KMs and Employee Mileage Log/Reimbursement Form

Other
- Per diem not eligible on provincially funded research grants.
- Ensure HST is not claimed on 0-rated or tax exempt supplies

Notes:
For any eligibility questions please refer to the Sponsor Guidelines. If no Sponsor Guidelines exist, please refer to the University Accounts Payable Guidelines (http://www.mcmaster.ca/bms/policy/accounts_payable/ap01-rem_univ_bus.pdf).

List of helpful Travel Forms below can be found on the Travel Website, http://www.mcmaster.ca/bms/BMS_PR_Travel_Info.htm.

Accounts Payable, Travel Non-Employee Expense Reimbursement Form
Missing Receipt Authorization
Mileage Log