



2018 endMS Summer School

Travel and Expense Policies – Invited Presenters/Facilitators/Mentors/Guests

Any questions should be directed to Anik Schoenfeldt by emailing: anik.schoenfeldt@mail.mcgill.ca or by calling (514) 843-1442 / 1-877-288-2570.

1) Air Transportation

Please review the following prior to booking your air travel.

Eligible fares and expenses:

- ✓ **Economy airfare** no matter which airline is used.
- ✓ **If you book through WestJet:** You could **save 10% off Econo fares** by utilizing **promo code YYZ02** and **coupon code KY1DVG**. To book using this discount code, visit www.westjet.com. Both the promo code and coupon code must be entered at the time of booking.
- ✓ **If you book through Porter Airlines:** Porter is offering a **10% discount** on available base fares (with the exception of the lowest class fare during a public seat sale) for travel to and from the Summer School, using the **promo code ENDMS18**. Visit www.flyporter.com to avail this discount.
- ✓ The first checked baggage fee is an eligible expense. However, oversized baggage fees are not eligible.
- ✓ Seat selection fees are eligible for reimbursement.

Non-eligible expenses:

- ✗ Business class travel will not be reimbursed.
- ✗ Costs associated with changes to air travel arrangements, including airline change fees and differences in airfare associated with the new booking, are not eligible for reimbursement. Be sure your arrival/departure times correspond with the start/end times of Summer School and estimated travel times to and from the airport.
- ✗ Other than meals (which are outlined below in item #3 – Meal Allowances), any air travel-related expenses (e.g. for onboard earphones, extra/oversized luggage) are not eligible for reimbursement.
- ✗ Fees related to booking air travel through a travel agent will not be reimbursed.
- ✗ Additional airfare for stopovers and other costs that are not related to the endMS Summer School, or do not result in cost savings to the Program, will not be reimbursed.

2) Ground Transportation

Public Transportation: We encourage, wherever possible, the use of Toronto's public transport system.

From Toronto Pearson: The Toronto Transit Commission ("TTC") offers an *Airport Rocket* express bus route that will bring you from Toronto Pearson to the subway system; for more information, please visit <http://www.ttc.ca>. Additionally, the Union Pearson Express Train also operates from Toronto Pearson, allowing you to arrive downtown in 25 minutes. For more information, please visit <https://www.upexpress.com/>.

From Billy Bishop Airport: Billy Bishop Airport offers a free regular shuttle service from the airport to the downtown core in 15 minutes. From there, it is possible to take the subway from Union Station. For more information, please visit:

<https://www.porttoronto.com/airport/passenger-information/to-from/airport-shuttle.aspx>.

Taxi/Uber: Taxi and Uber fares, plus reasonable gratuity, are a reimbursable expense. However, other less expensive forms of transportation should first be considered (e.g. airport/hotel shuttle services, public transportation etc).



Personal Vehicle: Use of a personal vehicle can be reimbursed as mileage, at a rate of ¢57 per kilometer, up to a maximum claim of \$200 per return trip. Mileage rate reimburses the cost of fuel and wear and tear on the personal vehicle. Additional fuel charges are not reimbursable when mileage rate is used.

Automobile Rental: Automobile rentals, where necessary or cost-justifiable, are a reimbursable expense. Rented automobiles should be non-luxury and of standard, compact or sub-compact size. The insurance cost of rented vehicles is also a reimbursable expense.

Ground Transportation in lieu of Air Travel: Participants may claim mileage, train, bus, automobile rental instead of airfare for travelling to Toronto, up to the travel award maximum.

Ground Transportation for local participants: Participants from the Toronto area may claim ground transportation expenses incurred when travelling to and from endMS Summer School sessions and networking events.

Parking: Airport and public parking expenses are eligible for reimbursement. Original receipts are to be submitted with the expense claim form.

3) Accommodation

Chelsea Hotel, Toronto, 33 Gerrard St. W, Toronto ON, M5G 1Z4

In order for the cost of rooms to be covered, they must be booked through the Program via Anik.

The Program will book and provide free accommodation at the Chelsea Hotel for all Summer School participants/guests who reside outside of the Toronto region. Accommodations include a room with a double/queen bed, desk and chair and bathroom. You must specify your preferred check-in and check-out dates via the online registration form. For more information on the hotel, please visit their website at: <http://www.chelseatoronto.com/en/>.

The Program does not object to family members traveling with presenters/guests, but no expenses related to family members will be reimbursed.

Extended Stays: Anyone wishing to extend their stay beyond their attendance at the Summer School is considered to be a personal expense and will not be reimbursed. For those who wish to extend their stay at the Chelsea Hotel pre/post-Summer School they can do so through the online registration form.

Hotel Charges: The hotel may require a credit card upon check-in for guests wishing to charge any incidentals to their rooms. Participants/Presenters/Guests are responsible for paying the hotel directly for any and all extra charges including any extra charges associated with an extended stay.

4) Meals

a) Provided Meals

The following meals will be provided for all participants at no charge during the Summer School:

- Dinner (Monday, June 11th, and Wednesday, June 13th)
- Breakfast (Tuesday, June 12th – Thursday, June 14th)
- Lunch and Breaks (Tuesday, June 12th – Thursday, June 14th)

Tuesday, June 12th is considered a free evening; please refer to section (3d) below for more information.

REMEMBER: Alcohol is not a reimbursable expense; please deduct all expenses for alcohol (including associated taxes and gratuities on this portion) when preparing your expense claim form.

TIP: Request a separate alcohol receipt, and pay for any alcoholic beverages separately.

b) Meal Allowances

Meal allowances are separate from, and in addition to, your travel award. Meals outside of those provided during the Summer School will be reimbursed up to a maximum of (including taxes and gratuities):

Breakfast: \$10.00 Lunch: \$16.00 Dinner: \$28.00

c) En route meals

Participants are entitled to expense en route meals both to and from Toronto, up to a maximum of \$16.00 each way (including taxes and gratuities). This could include meals purchased at the airport, onboard flights or otherwise en route. Original, detailed receipts are required.

d) Free Evening – Tuesday, June 12th

Dinner will not be provided during the evening of Tuesday, June 12th. As such, the Program will reimburse for any out-of-pocket meal expenses up to \$28.00 (including taxes and gratuities). The original detailed receipt is required.

5) Required Documentation for the Expense Claim Form

*** Please refer to section (6) for a guide to completing the Expense Claim form.***

a) Documentation for Air Travel

Below is the list of required documents for air travel reimbursement:

- **Passenger Itinerary/Receipt**
- **Original boarding passes for all flights**
- **Proof of payment (itemized receipt and copy of credit card statement)**

While the Program will reimburse any air travel booked through online travel agencies, the necessary itinerary/receipt is required. **Booking confirmation without breakdown of charges and proof of payment is not acceptable for reimbursement.**

b) Documentation for Meals

Both the itemized receipt showing actual meal and beverage details AND the proof of payment must be submitted with the expense claim form. Credit/debit card receipts are not acceptable by themselves (without the itemized receipts) as they do not provide the details of the expense. **If payment is by credit card, a copy of your credit card statement with expenses highlighted must also be included.**

Write your name and the names of the individuals whose meals are covered by that receipt on the back of the receipt. Gratuities (if any) should be included on the proof of payment. **Reminder: Alcohol is not a reimbursable expense;** please ask for a separate bill for alcohol or deduct all expenses for alcohol (including associated taxes and gratuities) from your claim.

6) Guide to Completing the Expense Claim Form

Anyone requesting a reimbursement for the **first time** through the endMS National Training Program **must complete and return a Direct Deposit Form**. This form can be mailed along with the expense claim. The direct deposit form and expense claim form will be available closer to the date.

Tips to avoid reimbursement delays:

- ✓ Please ensure that you enter the "Claim Date" as the day you are submitting the expense claim form, as doing so will provide you with a unique Claim No.
- ✓ If a receipt is lost, please complete the "Missing Receipt Declaration" (2nd tab in the expense report form).
- ✓ All receipts must be entered individually, i.e. one receipt per line.
- ✓ All expenses must be reimbursed to the person who incurred them. If any expenses were paid for by a relative, supervisor or other individual, they must submit a separate expense claim form for those expenses (one form per claimant). Expenses paid directly by the participant's institution may also be reimbursed back to that institution upon submission of a separate expense claim form.
- ✓ Handwritten expense claims will not be accepted by the RI-MUHC. Please complete the form on a computer.
- ✓ Remember to deduct all amounts for alcohol (including taxes and tip), as this expense will not be covered.
- ✓ Ensure that you sign your expense claim on the last page.
- ✓ Make a copy of your claim and receipts to keep as backup for your own records.

At the conclusion of Summer School, **participants must complete, sign and return the expense claim form, along with all original attachments, by Tuesday, July 17, 2018 to:**

endMS National Training Program
c/o Anik Schoenfeldt
Research Institute of the McGill University Health Centre
1025 Pine Avenue West, Room P2.028
Montreal, QC H3A 1A1

Below is a handy chart to help in completing the expense claim form.

Item to be Claimed	Expense Category on Form	Required Documentation for Expense Claim
Air Transportation	<i>Airfare</i>	Copy of passenger itinerary/receipt Original boarding passes Copy of itemized receipt and copy of credit card statement
Ground Transportation	<i>Other-please specify</i>	Copy of passenger itinerary/receipt Original tickets Copy of itemized receipt and copy of credit card statement
Meals	<i>Meals</i>	Original itemized receipt showing actual meal and beverage details Deduct expenses for alcohol including associated taxes/gratuities
En route Meals		Original receipt showing proof of payment Copy of credit card statement (if used)
Public Transportation	<i>Other-please specify</i>	Original receipt showing proof of purchase Copy of credit card statement (if used)
Taxi/Uber	<i>Taxi</i>	Original receipt showing proof of purchase (for taxi) Copy of emailed receipt (for Uber) Copy of credit card statement (if used)
Personal Vehicle	<i>Mileage-57c kilometers</i>	Copy of Google Maps departure and arrival endpoints Copy of credit card statement (if used)
Automobile Rental	<i>Car Rental</i>	Original receipt showing proof of purchase Original gas receipts (if any) Copy of credit card statement (if used)
Parking	<i>Parking</i>	Original receipt showing proof of purchase Copy of credit card statement (if used)

Name → Miester Myzptik
Itinerary → Date Booked: SEP2008
Payment → Total: \$203.08 CK

SAMPLE CREDIT CARD STATEMENT Account Number

Make check payable to: My Credit Card P.O. Box 4567 Anywhere, CA 91111

Reference Number	Posting Date	Description of Transaction	Debits	Credits and Payments
0077623	0608	ABC Stores Unlimited	108.20	
0317886	0608	Autogly Cable Network	58.00	
7075061	0610	Let's Go Car Rental	159.72	
4871311	0610	Sleep Nice Motel	128.00	
5887041	0622	AAA Airlines	109.32	
9283742	0630	payment - thank you		40.00

Previous Balance	Payments	New Charges	Finance Charge	New Balance
639.62	40.00	563.24	17.04	1379.90

Average Daily Balance	Monthly Periodic Rate	Annual Percentage Rate (APR)	Finance Charge	Credit Limit
1011.00	1.042%	12.50	17.04	\$3,000.00
				Credit Available
				\$1820.10

Itemized Receipt → [Screenshot of receipt]

Proof of Payment → [Screenshot of receipt]

Meal Details → [Screenshot of receipt]

Boarding Pass → [Screenshot of Air Canada boarding pass]