

**Policy Title:** Travel  
Policy Approver: President's Office  
Policy Holder: Finance and Administrative services  
Category: Operational  
Original Date: October 1992  
Last Revised: November 2015  
Next Review: November 2020

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### **Policy Statement**

Yukon University is committed to responsible management of University resources and ensuring that all travel by University employees and delegates for University purposes results in the most economical use of University human, time and financial resources.

This policy is established to ensure travel expenses are reported, reimbursed, and accounted for with relevant original receipts and documentation. Employees and delegates are not expected to subsidize these costs nor is it expected that employees and delegates will profit from travel on University business.

### **Approval Statement**

With the consent of the Senior Executive Committee and approval of the President of Yukon College, this policy is hereby deemed in effect the 4<sup>th</sup> day of November, 2015.

Karen Barnes

November 4, 2015

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President, Yukon College

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Date

## 1. Purpose of Policy

Yukon University is a complex and dynamic institution working with a diverse partnership network, student body, and general public. The University strives to provide a working environment that encourages employees to manage University resources prudently and ensure appropriate value for money in all University funded activities.

Yukon University is committed to ensuring administrative and operational policies incorporate Board of Governors policies, comply with laws, and reflect the University's values, legal, and ethical requirements.

Pursuant to the Yukon College Act<sup>1</sup>, Section 4.1(a) the College may, "establish and implement policies concerning the organization, administration and operation of the College."

This policy works in conjunction with federal and territorial standards and the Collective Agreement to ensure that Yukon University employees are reimbursed for reasonable out of pocket expenses necessarily incurred while travelling and performing University related duties.

All travel must align with the strategic priorities of the University.

## 2. Governing Legislation and Relevant Documents

University Strategic Directions  
Yukon University Act  
Workers' Compensation Act (Yukon)  
Occupational Health and Safety Act (Yukon)  
Yukon University Safe Work Practices Procedures  
Yukon University Insurance Policies  
Collective Agreement

## 3. Scope

This policy applies to all University employees, contractors, students, and other members of the University community who travel on behalf of Yukon University.

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<sup>1</sup> The then Act

Where granting agency stipulations or negotiated research contracts indicate variations from this policy, such variations will apply. If it is unclear which expense reimbursement procedure applies, contact Finance & Administrative Services.

#### **4. Definitions**

See Appendix A for a list of terms and definitions used in this policy.

#### **5. Procedures**

Yukon University expects employees to manage University resources prudently and ensure appropriate value for money is received when travelling for University purposes. The University will reimburse employees and others for reasonable out of pocket expenses necessarily incurred while performing University related duties.

##### **5.01 Travel Authorization**

All travel on University business requires pre-approval using the Travel Authorization and Claim form. This applies even if the employee will not incur expenses for reimbursement. It is the responsibility of the employee or delegate who is travelling to ensure the Travel Authorization and Claim form is completed and to obtain signed approval before commencing travel. Administrative staff can support this process where applicable.

Employees and delegates travelling on University business will be authorized by the appropriate approval authority based on the total cost of the trip in accordance with Yukon University policy, AS 1.0 Approval Authority. Under no circumstance will an employee or delegate approve their own travel authorization request or claim for reimbursement.

Travel authorization requests will include an estimate of the total cost of the trip and a brief rationale explaining the purpose of the trip. Travel costs are to be estimated using the Travel Budget Estimate form. The most safe and economical means of travel will be utilized unless the trip is absolutely essential, and the basic economy fare is not available.

##### **5.02 Travel Arrangements**

Employees and delegates travelling on University business are responsible for making their own arrangements for travel and accommodations. Travel will normally be arranged with the

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support of administrative staff and made through the travel agency retained by the University. In such cases, a Travel Agency Authorization form will be completed and approved.

An employee may arrange and pay for their travel and accommodations without assistance from a travel agent where this is deemed to be more expedient. Such cases should be limited to fairly simple or common trips that do not require excessive time to arrange, and the employee must make their travel arrangements utilizing the most safe and economical means of travel, including consideration for their time.

Upgrades that are more costly than the standard economy fare should not be purchased unless they are the only option available for that period and it is absolutely essential that the employee travel at that time.

Employees and delegates may use their personal credit card for trip expenses and be subsequently reimbursed or use any of the University payment methods to confirm arrangements for budgeted expenses such as flights, accommodations, rental vehicles, and conference registrations.

Employees are responsible for ensuring all costs associated with the trip are paid. If the employee uses their personal credit card, they will not be reimbursed until after the trip has occurred.

Commercial rental vehicles from the University's approved vendor will normally be used for travel to Yukon communities. All travel to communities must be communicated to the administrative office for communities to ensure group travel is utilized where possible and the communities are aware of planned trips. Air travel within Yukon may be considered and approved where economical or where time constraints make it necessary.

### **5.03 Travel Advances**

Employees and delegates authorized to travel on University business may be issued a travel advance that will not exceed 75% of the estimated out-of-pocket costs to be incurred by the employee during the trip. Up to 100% of the out of pocket costs can be advanced to an employee or delegate with the approval of the Manager of Financial Services or his or her designate.

Payments on approved travel advance requests will normally be issued at least once a week. The Finance & Administrative Services office may perform a specific payment run to issue a

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travel advance under exceptional circumstances. In such cases the requesting department will incur a \$75.00 service fee.

A travel advance will not normally be issued until previous travel advances have been fully accounted for, or when the estimated out-of-pocket expenses are less than \$100. No more than two (2) travel advances will be outstanding at any time and any monies advanced to an employee may be recovered from an employee's salary or wages if lost, stolen, or not otherwise fully accounted for.

#### **5.04 Out of Territory Travel, Charter Flights & Workers' Compensation**

International travel and travel by charter aircraft will be approved by a Vice-President, the President or their designate. The travel request will include a risk assessment using the University's risk assessment worksheet when chartering an aircraft.

Employees travelling outside Yukon on University business must ensure they have workers' compensation coverage either through WCB Yukon or the jurisdiction they are travelling to. Coverage from another jurisdiction may be required depending on the length of stay and nature of the work being done outside of the Yukon. WCB requirements for other jurisdictions are available on the University portal on the policies page. Employees must review the requirements to verify if registration is required in the jurisdiction they are travelling to. If registration is required, the employee must notify payroll and payroll will ensure the employee is covered. If registration in the jurisdiction is not required, the employee must complete the form from WCB Yukon that is available online and entitled 'Application for Coverage Outside' and ensure that coverage is confirmed by workers' compensation before the trip occurs. The link for this form is <https://www.wcb.yk.ca/Forms/Assessment-Forms/extendedCoverage.aspx>.

#### **5.05 Accommodations**

Employees and delegates are responsible for ensuring that University resources are used prudently by arranging the most appropriate, practical, and economical accommodations for their trip.

Employees and delegates may arrange any of the following accommodations while in Whitehorse:

- Private accommodations, which will be reimbursed at the established rate for employees staying in private homes;
- Yukon University Residence where appropriate and available;
- Any hotel in Whitehorse designated by the University for such purposes.

Employees and delegates travelling outside of Yukon on University business are encouraged to use the services of the travel agency retained by the University to arrange appropriate and economical accommodations considering the cost of their accommodations in relation to the location of their meeting, conference, or other business activity.

Accommodations can be reserved and paid for with the corporate credit card up to the limit remaining on the card even if the card does not belong to the person travelling as long as the employee or delegate confirms with the accommodation provider that they will bill the charges to that card when the employee travelling will not have the card with them.

Per Diem rates for meals, incidentals, and telephone charges cannot be claimed as part of the cost of accommodations. Only the cost of the room and internet and parking charges (where applicable and when needed for work purposes) can be charged as accommodation.

### **5.06 Per Diems**

Meal claims will be reimbursed without a receipt up to the maximum amount of the per diem rates in effect at the time of the trip.

Where a business meal is provided to an employee or delegate or otherwise paid for by someone other than the employee or delegate, the employee or delegate will not claim or be reimbursed per diem rates for those meals. Under no circumstances will an employee or delegate claim or be reimbursed for any meals or other expenses under this policy when such expenses are accounted for as part of a University program or contract, or otherwise specified as part of an alternate or third-party funding arrangement.

Employees will not use the corporate credit card or other University funds to pay for meals when claiming per diem rates for reimbursement.

Employees and delegates will be reimbursed per diem incidental expenses only for each overnight stay while travelling on University Business.

### **5.07 Extended Trips**

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For trips to one location that exceed fifteen consecutive days (including approved trips home), employees or delegates will be reimbursed for 70% of the total per diem rate for the entire trip for every day of the week that they are away including weekends. The total length of the extended trip should be indicated on each travel claim submitted (including approved trips home). In these cases, the employee or delegate will strive to arrange accommodations that include kitchen and meal preparation facilities. When adequate kitchen and meal preparation facilities cannot be found, the Director of Finance and Administrative Services may approve an exception to the reduced per diem.

Employees who are on travel status will be entitled to additional travel benefits as per Article 32 of the collective agreement. Per Diem benefits can be claimed for the time spent travelling to and from the headquarters area and for time spent in the community should the employee decide not to return to their headquarters area as per Article 32 of the collective agreement.

#### **5.08 University Vehicles**

Employees are encouraged to utilize University owned vehicles for local travel when such vehicles are available and suitable for the employee's needs. See Yukon University policy, AS 24.0 Vehicle Usage Policy.

#### **5.09 Rental Vehicles**

Rental vehicles from the University's approved vendor will normally be used for travel to Yukon communities. A Vehicle Rental Authorization form must be authorized at the proper level in advance and submitted to the Procurement and Contracts Officer.

For vehicle rentals of 30 days or less, liability insurance coverage is generally provided by the car rental business, but this should be confirmed with the rental agency if in doubt. Where a vehicle is to be rented for longer than thirty (30) days or a fifteen (15) passenger van is to be rented for any length of time, the employee will contact Procurement Services to arrange additional insurance coverage. Damage to the vehicle itself is covered through the University's non-owned automobile policy.

Where approved as part of the travel authorization, employees may use the most appropriate and economical vehicle rental agency when travelling outside of Yukon.

Only the costs for vehicle usage directly related to University business will be reimbursed.

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## 5.10 Private Vehicles

Employees and delegates may use their private vehicles where no suitable public transportation, rental, or University vehicle is available or where a private automobile is more economical considering factors such as costs, time constraints, and itinerary.

Before employees and delegates use a private vehicle for University business and are reimbursed for mileage, they are required to complete a Waiver – Private Vehicle Use form to certify that they have business use insurance for their vehicle. This form will be kept in the employee's personnel file.

Yukon University is not responsible for any damage done to a private vehicle that is being used for University business. A minimum of \$1,000,000 in third party liability insurance is required and employees and delegates are strongly encouraged to obtain \$2,000,000 in third party liability insurance coverage and any other coverage they deem appropriate for their circumstances.

## 5.11 Mileage and Reimbursement for Public Transportation or Taxis

Employees and delegates will normally be reimbursed for mileage using the University mileage rates in effect at the time of the trip. Mileage is intended to cover the cost of gas, business insurance and other operating costs of the vehicle. Yukon University is not responsible for any maintenance and/or repair costs for a private vehicle that is being used for University business.

Where an employee or delegate requests and is approved to use their personal vehicle, and other modes of transportation are available at less cost, the employee or delegate will be reimbursed at rates equivalent to the most economical costs. Exceptions to this can be considered when travelling to Yukon communities and where travel at a lower cost is not practical for operational purposes.

Employees will not be reimbursed for mileage that occurs within the municipal limits of their community when running errands, etc. In such cases, employees are encouraged to use University vehicles if available or take public transportation or taxis.

Positions designated by a VP or the President can be reimbursed for mileage incurred within the municipal limits of their community when the use of a private vehicle is required in

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supporting and supervising students in practicum placements off campus or for other educational purposes as outlined in the list of designated positions. The list of designated positions will be maintained in Administrative Services and will be available on the University portal in the policies section. Use of University vehicles and public transportation is to be encouraged whenever possible as an alternative to using a private vehicle. Travel between the University and the practicum site or between multiple practicum sites in a day is eligible for reimbursement but travel directly from home to a practicum site and back is not eligible. If it is determined that taking a taxi or public transportation is necessary to attend practicum placements, the employee will be reimbursed for this cost if this is approved in advance by the employee's supervisor.

### **5.12 Reasonable/Other Expenses**

Employees and delegates will be reimbursed for reasonable expenses while travelling on University related business.

Employees with dependents may be reimbursed actual costs to a maximum of \$30.00 per day for care of dependents while travelling on University business. In such cases an employee may claim only those expenses that are in excess of the otherwise normal expenses they would incur for care and employees will not be reimbursed for any payments made to an immediate family member who permanently resides with the employee.

Employees and delegates can be reimbursed for freight for equipment and supplies required for business purposes and for basic luggage charges within the standard baggage allowance of major airlines.

Employees and delegates will not be reimbursed for ancillary personal expenses such as seat selection fees, trip cancellation insurance, and personal luggage costs in excess of the standard baggage allowance of major Canadian airlines.

Consuming alcohol while performing University related duties during travel is normally prohibited, but where specifically warranted a Senior Executive employee may be reimbursed for moderate and justifiable alcohol expenses for hospitality purposes with the approval of the President, Vice-President(s), or designate. Other employees will not be reimbursed for alcohol when travelling.

### **5.13 Travel Claims**

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Employees and delegates must fully account for their travel advance and trip expenses within sixty (60) days after the trip. A fee of \$100 will be deducted off the travel claim for late travel claim submissions.

All travel claims will be reviewed and approved by the appropriate approval authority based on the total cost of the trip before the completed Travel Authorization and Claim form is submitted to the Finance & Administrative Services office.

All trip expenses will be reported on the travel claim whether claimed for reimbursement or not. A copy of the bus, airline or other ticket (or e-ticket) must be attached to the claim whether or not the cost is being claimed. Claims for per diem expenses do not need receipts.

In completing a travel claim, the employee or delegate is responsible for ensuring the following:

- All information provided is accurate and all forms are included with the claim;
- All expenses are supported by original receipts or other proof of payment;
- All claims for reimbursement are valid under this policy;
- Mileage for the use of a private vehicle is reported on the claim if applicable;
- Any monies advanced to the employee or delegate are deducted from the claim;
- Arrival and departure times for each location are clearly indicated;
- Any personal leave that is taken during the trip is reported;
- When expenses are incurred in a foreign currency, reimbursement will be made based on the Canadian dollar amount as per the purchase documentation (normally a credit card statement) or will be translated at the applicable Bank of Canada rates at the time of purchase.

Payments will normally be issued on approved travel claims at least once a week. The Finance & Administrative Services office will not perform a specific payment run for travel claims.

Where an approved travel claim is received by the Finance & Administrative Services office and monies are owed to the University, such monies will be remitted to the University and attached as part of the approved claim.

#### 5.14 Travel Points

The University recognizes that most employees on business travel suffer some disruption to their personal time and family life. Where safe and economical travel has been arranged by

an employee, travel points and other rewards accumulated while travelling on University business may be redeemed as a taxable benefit by the employee at their discretion. In such cases the employee is responsible for satisfying the requirements for reporting the taxable portion of the benefit to the Canada Revenue Agency when choosing to utilize travel points, credit, or other benefits accumulated through business travel.

### **5.15 Personal Leave**

An employee may arrange personal travel at his or her own expense and take accumulated leave in conjunction with travel on University business. Personal leave must be approved by the employee's supervisor in advance and the employee will not be reimbursed for any expenses incurred during the period of personal leave.

Employees on personal leave are not covered by University insurance (other than what is covered through the employee benefit program) or worker's compensation.

### **5.16 Field Activities**

When employees and/or delegates are travelling as part of field activities for the University a field activity plan or risk assessment must be completed using the documents designated by the applicable division. The field activities plan, or risk assessment must be approved by the Dean/Director or Vice-President for the applicable division. Pets are not permitted on field trips. Students and staff are generally not permitted to bring their own vehicle if transportation is being provided. Only rare exceptions to this will be made such as medical or other logistical reasons.

## **6.0 Problem Solving**

The Director, Finance and Administrative Services may approve exceptions to this policy where such exceptions meet the standard for responsible and prudent use of University resources.

Any questions or concerns arising out of the intent, content, or implementation of this policy should be reported to the Director, Finance and Administrative Services.

Where a concern or dispute arises from a decision made as a result of applying this policy the Director, Finance and Administrative Services should be notified as soon as possible. In such

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cases employees or delegates are encouraged to work cooperatively with the University to resolve any concerns.

Where a concern or disputes arises as a result of enforcing this policy, the procedures for administering discipline and processing of grievances will follow the relevant sections of the Collective Agreement.

Bargaining unit members have the right to appeal decisions made under this policy in accordance with the conditions set out in the Collective Agreement.

Excluded and management staff and other members of the University community may appeal decisions made under this policy by following the relevant section(s) of the Yukon University policy, HR-02 Employment Conditions and Procedures.

## **7.0 Other Related and/or Accompanying Documents**

### **Forms:**

Travel authorization and claim form  
Travel budget estimate form  
Travel agency authorization form  
Vehicle rental authorization form  
Waiver - private vehicle use form  
Risk assessment worksheet

### **APPENDICES: Appendix A – Definition of Terms**

### **ADDENDUMS:**

Addendum A – Staff designated to claim mileage for travel within city limits  
Addendum B - WCB regulations in other jurisdictions  
Addendum C - Policy Communication Checklist

**APPENDIX A - DEFINITION OF TERMS**

- **Delegate:** refers to anyone other than an employee of the University such as a student or contractor.
- **Per Diem:** is a reasonable allowance of a predetermined amount that may be claimed with no requirement to provide receipts in lieu of claiming actual expenses.
- **Proof of payment:** is documentation that demonstrates the evidence that the expense was paid for personally (e.g. credit card receipt or statement, bank statement, money order receipt, cancelled cheque (copy of front and back), receipt or invoice indicating payment).
- **Senior Executive:** refers to the President, the Vice-Presidents, Deans, Directors and Registrar.

**ADDENDUM A – STAFF DESIGNATED TO CLAIM MILEAGE FOR TRAVEL WITHIN CITY LIMITS**

All mileage claims must be approved by supervisor

Applied Arts

- YNTEP coordinator/faculty advisor – to visit practicum sites
- YNTEP faculty advisor – to visit practicum sites
- BSW coordinator/instructor – to visit practicum sites
- BSW instructor – to visit practicum sites
- LPN coordinator/instructor – to visit practicum sites
- LPN instructor – to visit practicum sites
- HCA coordinator/instructor – to visit practicum sites
- HCA instructor – to visit practicum sites
- ECD coordinator/instructor – to visit practicum sites
- EA coordinator/instructor – to visit practicum sites

Applied Science and Management

- Instructors Office Administration – supervising FILD 100 course in office administration program
- CE Instructors – for teaching off site or transporting equipment to different sites for courses (includes casuals and contractors), as approved by Chair
- CE Chair – to do business development
- CE Manager – to do business development
- TIOW Instructor Coordinator – to visit practicum sites
- ELT Instructor Coordinator – to visit practicum sites

University and External Relations

- Director – for advancement purposes
- Manager of Advancement – for advancement purposes

First Nations Initiatives (FNI)

- Director FNI – to do training sessions off site and for external relationship building

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- Manager of FNI – to do training sessions off site and external relationship building
- FNI Facilitator – to do training sessions off site

Office of the Registrar

- Enrolment Services Officer – visits to local schools and recruitment events
- Enrolment Management Advisor – visits to local schools and recruitment events
- International Education Coordinator – to do home visits for homestay program and relationship building

**ADDENDUM B – WCB REGULATIONS IN OTHER JURISDICTIONS**

<b>Jurisdiction</b>	<b>Length of stay</b>	<b>Notes</b>
Alberta	15 days or more	Depends on what the person(s) are doing. If attending or speaking at a conference or engaging in low risk activity registration is not required if 15 days or more.
British Columbia	9 days or more	
Manitoba	15 days or more	Register prior to 15 days but only if person is going for more than 15 days. Depends on what the person(s) are doing. If attending or speaking at a conference or engaging in low risk activity registration is not required if 15 days or more.
New Brunswick	7 days or more mandatory (3+ persons)	Voluntary Coverage for (1 to 2) persons but only if will earn more than \$3,000. In most situations University employees should not have to register.
Newfoundland and Labrador	No minimum	Register prior to trip. Registration will depend on what the person(s) are doing. If attending or speaking at a conference or engaging in low risk activity registration is not required.



Nova Scotia	5 days or more (3+ persons)	Registration for (1 to 2) persons generally not required if there for 5 days or more but depends on what the person(s) are doing so employees should verify before going.
Ontario	11 days or more	Depends on what the person(s) are doing. If attending or speaking at a conference or engaging in lower risk activity registration is not required if 11 days or more.
Prince Edward Island	No minimum	Register prior to trip. Registration will depend on what the person(s) are doing. If attending or speaking at a conference or engaging in low risk activity registration is not required.
Quebec	No minimum	If attending or speaking at a conference or engaging in low risk activity registration is not required.
Saskatchewan	5 consecutive day per year or 3 or more times per year	Registration will depend on activity
Northwest Territories	10 days or more	
Nunavut	10 days or more	

**ADDENDUM C - POLICY COMMUNICATION CHECKLIST**

Policy Name: Travel Policy

Number: AF 7.0

Submitted by: Director Finance and Administrative Services

List those consulted with in preparation of this policy:

Name	Department	Date
Administrative and finance staff	Administrative Services	
Office staff	Various divisions	
SEC	Various divisions	

The order for communication and/or consultation for a new or revised policy is as follows:

1. SEC – initial review and recommendations from SEC membership;
2. Identified stakeholders within Yukon College in order of priority – see below;
3. SEC – to be briefed on any issues arising out of stakeholder consultations;
4. Staff – SEC members to bring policy to their staff for feedback (*SEC member introducing this policy is responsible for sending to SEC, requesting that it be circulated to their staff for feedback*);
5. SEC – final draft supported by SEC membership and approved by the President.

This checklist must be completed prior to the final draft of a policy being presented to SEC for presidential approval.

Body	Communication Planned	Completed	Comments
SEC	Yes		
Student Union	Yes		
Employee’s Union	Yes		
Occupational Health and Safety	Yes		
Academic Council	No		
Board or a Board subcommittee	No		
<i>Other</i>			
SEC for Final Review	Yes		

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