



**Instructions:** *If completing by hand, please print.*

Preparer/claimant: Complete all shaded areas as applicable. When completed, **make a copy of your claim and receipts for your records** and forward the original claim to Attn: Paula Perri, Mgr. Gen. Acctg., Finance, 4700 Keele.

**Notes:**

- Claim must comply with [Procedure on Reimbursement of Expenses](#) and [PER Guidelines for Senior Scholars](#). For useful info, see [Expense Claim Review Checklist and FAQ](#).
- Payroll Services processes all remuneration including honorariums, stipends, prizes, etc. SFS processes awards, bursaries, etc. Do not use this form for these payments.
- If refunding the university for an accountable advance, do not send cash through external or internal mail.

<b>Claimant's Name</b>	Surname		First Name	
<b>* Mandatory - Employee #</b>	E		Direct Deposit	Click here for <a href="#">Employee Direct Deposit Banking Application</a>
<b>Contact Details</b>	Phone		Email (mandatory)	
<b>Claimant's Mailing Address</b>	Internal campus address or External address			
	City	Province/State	Postal code/Zip	Country

<b>Purpose of Expenses</b> (please attach agenda for conference-related travel)		
<b>Travel Details</b>	Destination(s)	Dates
<b>Explain basis</b> on which you can be seen as representing York University		
<b>Please note:</b> If you are submitting a claim for conference-related expenses or fees for membership in an academic association or society, you must identify the course(s) you are teaching, students you are currently supervising and/or the specific research project(s) in which you are engaged for which you can be seen as representing York University.		

If there is insufficient space to itemize your receipts, please use the [Receipt Itemization and Rebate Calculator tool](#).

Explanation		Automobile		Expenditures						
Date	Description	# of KM's	Amount @ 45¢	Air, Bus or Rail	Taxis	Lodging	Meals	Hospitality	Other	Total
<b>Total Expenses</b>										<b>A</b>

Preparer must complete all non-shaded areas. Only the specific shaded boxes are for Finance Use.

Finance Use Only	Vendor ID			Open Advance Reference #		Payable in		
	Chartfield(s) to be Charged			Optional		CAD	USD	Other
	Account	Fund	Cost Centre	Activity	Time	Location		Amount
Checked by								
Date	For detailed instructions on the HST/GST rebate, see calculator at <a href="http://www.yorku.ca/finance/documents/rebate_calc.xls">http://www.yorku.ca/finance/documents/rebate_calc.xls</a>							
	001623	200	233009	GST rebatable expenses	\$		x 0.0258	
	001680	200	233009	HST rebatable expenses	\$		x 0.078	
	<b>Total Expenses</b>							
	<b>Less Accountable Advance</b>							
	Due Claimant (if positive)		Refund York (if negative); please attach cheque			Net Amount		

**This section must accompany your expense claim or it will be returned**

**Claimant:** I hereby certify I have incurred these expenditures, that they are in compliance with all university policies and they have not been reimbursed by a third party. I will acknowledge the university in the dissemination of results from my scholarly activities.

\_\_\_\_\_  
Claimant's Name (print)                      Claimant's Signature

\_\_\_\_\_  
Title & Unit                                      Date

\_\_\_\_\_  
Prepared by (print)                          Signature

\_\_\_\_\_  
Phone    Date

Approval must be obtained from the Manager of Research Accounting or the Manager of Accounts Payable.

**Claimant should forward the completed claim to the attention of:**

**York University**  
**Attn: Paula Perri, Manager General Accounting**  
**Finance Department**  
**4700 Keele Street, Toronto, ON M3J 1P3**

**Approver:** I hereby certify that I have reviewed the expenditures, confirmed that they are in compliance with all University policies, and that sufficient funds are available to cover the expenditures.

**Travel Claims:**

- Purpose of travel is clearly documented in sentence form.

**Eligibility of Claimed Expenditures:**

- Eligibility of expenses has been checked against Senior Scholar PER guideline.
- Required information (i.e. identification of teaching or supervisory activities and/or research activities in which the applicant is engaged) is provided for claims for conference-related expenses and/or fees for membership in academic associations and societies.
- Claim has been reviewed for reasonability of amounts being expensed. Any expenses that are atypical or could be construed as excessive must have a complete explanation justifying the eligibility.

\_\_\_\_\_  
Approver's Name (print)                      Approver's Signature

\_\_\_\_\_  
Title & Unit                                      Date

Briefly explain how the expenses being claimed directly relate to your scholarly or research activities at York University.