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PIERRE ELLIOTT
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Catalina's Five Tips to Expedite Your Expense Reimbursement

Picture yourself at the high point of your academic year, say at a renowned international forum. You have just successfully delivered a presentation or moderated a panel, and you are now going to celebrate with a dinner at this little place your mentor or cohort fellows recommended. The bill lands on the table – you keep it for your records, of course. The following morning or three months from now, you will want to claim the expense at the Foundation. But can you make your reimbursement process as enjoyable as this dinner?

These five tips will help you make the Foundation's claims process as smooth and serene as possible.

Tip 1 – Always refer to the Foundation's policies and instructions.

“I know it is self-evident, but referring to the [policies and instructions](#) provided is really the best way to ensure a quick and easy expenses reimbursement process,” asserted [Catalina Chew](#), administrative assistant for the Foundation's programs. The first tip is easy: carefully review the Foundation's policies and guidelines on your [Portal](#) before making your claim. This is the best way to start off on the right foot.

It will also answer most of your questions. Do you find yourself wondering about the time you lost your hotel key in Serbia and had to pay extra? Wouldn't it all be easier if you knew this was incidental expense, subject to the [National Joint Council's rates](#)? “Trust me, it would,” Catalina affirmed. And it would make the expenses reimbursement process easier on both ends if community members paid more attention to maximum expenses per category, she added.

Tip 2 – Uphold the three-month deadline.

The second tip is that reimbursement claims at the Foundation have a three-month deadline. No expenses will be reimbursed after three months, so set some time aside to gather your documents and file the claims on time. Also, keep in mind that the Foundation organizes its activities around the end of its financial year, on 31 August. So remember to submit your last reimbursement claims at the latest on 31 July. For expenses incurred in August, please submit your claims during the first two weeks of September.

Tip 3 – Stick to the per diem allowances for your region.

Catalina's third tip is to stick to the Foundation's per diem allowances. “Per diem is no problem, as long as you consider which allowances policy apply to you based on your travel destination.” When travelling in the US and Canada, the Foundation requires that you refer to the [Appendix B on Per diem allowances](#). It may well be that your studies and travels take you beyond the US and Canada.

For travel exceeding 30 days, the amounts you can claim for reimbursement are subject to the policies of the [National Joint Council](#) of the Public Service of Canada.

Tip 4 – Pay attention to the exchange rate.

When making a reimbursement claim for foreign currency expenses, it is important that you also consider the exchange rates in effect at the time of the expense. The fourth tip is therefore to plug the right date and amount of the expense in the Bank of Canada’s [currency converter](#) to retrieve the exact value of the expense in Canadian dollars at the time of purchase. It is also very important that you print or capture the screen of the currency converter with the exact value and exchange rate, and that you enclose the resulting PDF document in your expenses reimbursement claim. If the currency you are looking for does not appear in the Bank of Canada’s currency converter, please use the [Oanda currency converter](#).

“An expense claim, however long, gets expedited more quickly if all the correct exchange rates and values are there, with copies of the Bank of Canada currency converter,” confirmed Catalina.

Tip 5 – Hold onto your boarding pass.

Finally, please be so kind as to aspire to a minimalistic yet holistic mindset when making expenses reimbursement claims. “Scan and send the documents, all the documents, and nothing but the required documents,” Catalina emphasized. Most importantly, your boarding pass is one of the documents required for travel expenses reimbursement. Catalina’s last tip is to hold onto this flimsy piece of paper as if your expenses reimbursement process depended on it – because it does. In case of loss, please [request](#) a Statement of Lost Boarding Pass.

To learn more about the expense claim process at the Foundation, please consult [this document](#).