Submitting a request for reimbursement of relocation expenses

Important – Before submitting a request

Before submitting any claims for relocation expenses, please check that this type of reimbursement is included in your employment contract with the University of Ottawa. Otherwise, these expenses may not be eligible for reimbursement.

Here is a non-exhaustive list of eligible expenses:

- Packing, moving and unpacking of furniture and personal effects, as well as insurance and storage for a period not to exceed one month. Two quotes are required, with the lower quote serving as a basis for reimbursement.
- Travel for the family by most economical means, in accordance with the terms and rates specified in Regulation 21. Reasonable living expenses during travel.
- A house-hunting trip (your partner may accompany you).

Be sure to have on hand two quotes from moving companies; the lower quote will be used as a reference to calculate your reimbursement amount.

Creating a claim for a claim for reimbursement of relocation expenses

You must submit your claim for reimbursement through Workday.

1. Use your University login credentials to log into Workday, and under Menu in the top left corner, select Expenses.
2. In the **Actions** box, select **Create Expense Report**.

3. Fill in the following fields:

- **Company**: University of Ottawa
- **Expense Report Date**: 2023-04-27
- **Business Purpose**: Select Relocation
- **Cost Center**: Refer to the table
- **Fund**: Refer to the table
- **Enable Tax**: Check the box

Click **OK**.
Below you will find all the information to enter in the Cost Centre, Fund and Program fields to claim your relocation expenses. If your unit or service is not listed, contact your supervisor.

<table>
<thead>
<tr>
<th>Faculty</th>
<th>Cost Centre</th>
<th>Fund</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telfer School of Management</td>
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<td>FD1010</td>
<td>PG001035</td>
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<td>PG001044</td>
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</table>

Once you have finished entering information in these fields, click OK in the bottom left.

**Claiming reimbursement of your relocation expenses**

Once you’ve created your expense report, you need to add each expense for which you intend to claim reimbursement.

1. Click the Expense Lines tab.
2. Click Add to add an expense line.
3. Click Select files to attach documents, such as receipts, to each expense line.
4. In the Date field, enter the date listed on the receipt.
5. Click Expense Item. The instructions and details will differ, based on the expense item you choose.
6. In the Amount Total field, enter the total amount listed on your receipt, including taxes.
7. Change the Currency to the currency on your receipt. Workday will automatically convert the amount to Canadian dollars using the exchange rate in effect at that time. *If you want to change the Canadian dollar amount, you will need to attach a bank statement.*
8. Change the Program, Cost Centre, and Fund worktags if necessary.
9. Check the Lost or Missing Receipt box if you do not have a receipt for your expense. In the Comment field, explain why you have not attached a receipt.

**Claiming per diem**

You can claim a per diem to cover three meals a day and extra expenses. The amount of the per diem will vary depending on the duration of your stay.

1. In the Expense Item field, select Per Diem (travel allowance)
2. The total amount will be automatically calculated once you have finished filling out the Expense Details section.
3. Change the Program, Cost Centre, and Fund worktags if necessary.

*Carefully read the instructions before completing the Expense Details section.*

4. Enter the start and end dates of your travel in the Start Date and End Date fields.
5. In the Destination field, enter the name of the city you are visiting. The Travel Region and Country fields will automatically populate based on the information you enter in the Destination field.

Once you’ve finished filling out the Expense Details section, a travel log will display the dates and reimbursement rates based on the dates and destination that you entered. If you are claiming reimbursements for meals (breakfast, lunch and supper) for every day of your trip, leave the travel log as is. If certain meals were included in the cost of your accommodations, event registration, etc., or if you were not travelling for the entire day on the first or last days of the trip, you can exclude these meals from the travel log. To do so,

1. Click View Details.
2. Click the box next to the meal that you do not need reimbursed. Scroll down the page and repeat these steps for all the meals to which this applies.
3. Click Save to save your changes and return to the previous page.