

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:

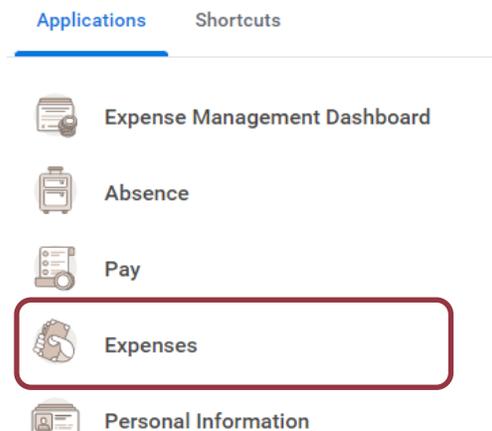
- Packing, moving and unpacking of furniture and personal effects, as well as insurance and storage for a period not to exceed one month. Two quotes are required, with the lower quote serving as a basis for reimbursement.
- Travel for the family by most economical means, in accordance with the terms 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.

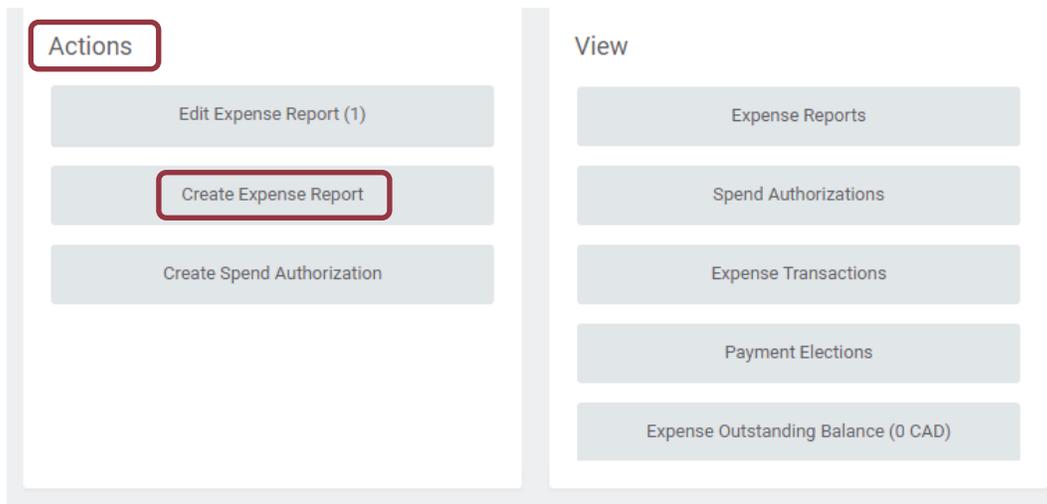
Creating a claim for a claim for reimbursement of relocation expenses

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:

Creation Options * Create New Expense Report Copy Previous Expense Report

Memo

Company * University of Ottawa

Expense Report Date * 2023-04-27

Business Purpose * ← Select Relocation

Grant

Program

Project

Gift

Cost Center * ← Refer to the table

Fund * Rechercher ← Refer to the table

Additional Worktags

Enable Tax

OK Annuler

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.

Faculty	Cost Centre	Fund	Program
Telfer School of Management	CC 9530	FD1010	PG001035
Faculty of Arts	CC 9530	FD1010	PG001036
Faculty of Education	CC 9530	FD1010	PG001037
Faculty of Medicine	CC 9530	FD1010	PG001038
Faculty of Health Sciences	CC 9530	FD1010	PG001039
Faculty of Science	CC 9530	FD1010	PG001040
Faculty of Engineering	CC 9530	FD1010	PG001041
Faculty of Social Sciences	CC 9530	FD1010	PG001042
Faculty of Law - Civil Law Section	CC 9530	FD1010	PG001043
Faculty of Law - Common Law Section	CC 9530	FD1010	PG001044

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.