

I HAVE A RESEARCH EXPENSE TO CLAIM (NON-PAYROLL RELATED)



1 COMPLETE THE FINANCE FORM REQUIRED FOR YOUR TRANSACTION

Use the form applicable to your type of transaction.

Travel reimbursement

- Travel and Expense Claim Form

Travel Advance

- Travel Advance Form

1. Request advance before travel
2. Complete your travel
3. After travel, complete the required forms, including the Travel & Expense Claim Form, and submit for reimbursement

Purchases through institutional procurement

- Purchase Requisition Form

Direct purchases or reimbursements

- Travel & Expense Claim Form or Cheque Requisition Form (as applicable)

2 COMPLETE THE REQUIRED RESEARCH FORM

The required research form depends on the type of expense being claimed.

TRAVEL

Complete: Research Expense Justification Form

HOSPITALITY

Complete: Hospitality Expense Form

For unusual hospitality expenses, provide additional explanation within the Hospitality Expense Form.

GOODS, SERVICES & EQUIPMENT

Complete: Research Expense Justification Form

3 ATTACH SUPPORTING DOCUMENTATION

Attach all required documentation to support your claim

Itemized receipts

Invoices

Proof of payment

Conference or event documentation (if applicable)

Attendee or participant information (if applicable)



Claims submitted without supporting documentation will be returned.

4 Exceptions must be addressed in the Research Expense Justification Form.

Examples include:

Late submission

Missing documentation

Unusual or high-cost expense

Other exceptions to standard requirements

An unusual or high-cost expense is an expense that is outside standard or common research practices or that is unusual in nature, amount, or frequency.

If yes, explain the exception in the Research Expense Justification Form.

If no, continue to the next step.

5 SUBMIT COMPLETE CLAIM PACKAGE TO FINANCIAL & REGISTRATION SERVICES

Your submission should include:

Applicable finance form

Required research form(s)

Applicable finance form(s)
Required research form(s)



Incomplete submissions will be returned.

6 FINANCIAL & REGISTRATION SERVICES REVIEW

- Reviews documentation
- Reviews financial requirements
- Verifies completeness



7 VP (RESEARCH & GRADUATE STUDIES) REVIEW

- Reviews research justification
- Assesses eligibility
- Reviews exceptions (if applicable)



8 OUTCOME



Approved and processed

- Payment issued



Returned for clarification

- Action required



Adjusted to remove ineligible expenses

- Partial approval



Denied

- Not eligible



IMPORTANT

Researchers are responsible for:

- ✓ Using the current versions of institutional forms
- ✓ Reviewing submission requirements before submitting claims
- ✓ Ensuring claims are complete prior to submission



Support Contacts

[Research Financial Administration Policy and Compliance](#)

Dr. Faye Noohi

Research Compliance & Policy Officer

noohif@brandonu.ca

[Research Financial Administration Review and Exceptions](#)

Sally Spiss

Research Accountant

spiss@brandonu.ca

[Expense Claim Submission and Accounts Payable Inquiries](#)

payables@brandonu.ca

[General Financial Inquiries](#)

buaccounting@brandonu.ca



BRANDON UNIVERSITY