



**Purpose:** The purpose of this document is to provide guidelines for spending for the Visiting Scientist Program, and to outline the reimbursement process.

### **Reimbursement Policy**

The McDonald Institute anticipates that awardees will receive partial financial support from host institutions (or provide partial support for visitors, if acting as a host). The Institute will reimburse applicants for certain eligible expenses to the full amount. All successful applications will be capped to a maximum of \$15,000 CDN total reimbursement in aggregate across any combination of reimbursement categories.

Awardees may opt to claim reimbursements for either of:

1. direct receipted expenses for travel/accommodation costs incurred to pursue a visit (not otherwise supported by a host or by other research funding); or,
2. basic subsistence support equal to a maximum of 50% of incurred salary reduction (e.g., salary adjustments for sabbatical leave);
3. up to 50% of direct receipted travel/accommodation costs incurred to host an international astroparticle physics researcher hosted in Canada by an astroparticle physics researcher.

Direct cost reimbursements should follow normal Tri-Council guidelines for research-supported travel (i.e., economy class, per-diem meal guidelines, etc.). A subsistence reimbursement will be made at a rate of \$75 CDN per working day inside Canada and \$100 per working day outside of Canada. Total reimbursements are capped at \$15,000 per award. It is the responsibility of the applicant to budget accordingly. The tables below outline which expenses are eligible for reimbursement and those that are ineligible

<b>Eligible Expenses</b>
Air travel; claimed at the lowest rate available and not to exceed full economy fare. Includes flight cancellation insurance and seat reservation charges.
<p>Accommodation This includes any necessary accommodation while travelling to and from the exchange destination, as well as accommodation for the duration of the exchange. Accommodation during travel/relocation may be covered for a maximum of 4 days, pending approval.</p> <p>If in-kind accommodation is available for the duration of the exchange and meets the needs of the applicant, the applicant should opt for such accommodation.</p>
Travel health insurance when such benefits are not provided by the institution and/or other sources.
Entry visa fees for the purpose of attending the research exchange.

<b>Ineligible Expenses</b>
Alcohol
Personal Insurance for Car Rental
Commuting costs between one's residence and place of employment/study, or between two places of employment.
Household items/set-up costs including furniture, decorations, other household supplies.
Personal Insurance
Passport and Immigration Fees (such as Biometrics or processing fees)
Reimbursement for airfare purchased using personal frequent flyer points programs.

Please note that this is not an exhaustive list of ineligible expenses. For a more comprehensive list, please refer to the CFREF Administration Guide: [http://www.cfref-apogee.gc.ca/program-programme/admin\\_guide-guide\\_administration-eng.aspx# Direct costs](http://www.cfref-apogee.gc.ca/program-programme/admin_guide-guide_administration-eng.aspx# Direct costs)

Both the Visiting Scientist and PhD Exchange programs are eligible for indirect cost to a maximum of 25% of the total award value. Indirect Costs must be in support of the funded initiative and not for general institution overhead. To check for eligibility of costs please refer to: <https://www.rsf-fsr.gc.ca/administer-administrer/expeditures-depenses-eng.aspx>

In some instances, there are exceptional circumstances to the policy. If you believe you have an item that requires discussion, please contact the McDonald Institute Financial Officer **prior** to incurring any expenses for discussion and possible pre-approval.

### **Supporting Documentation**

In order to obtain reimbursement for eligible expenses, the following documentation must be retained and provided to the McDonald Institute Finance Officer immediately following the conclusion of the visit (or no sooner than three months after the start of the visit in the event that quarterly reimbursements are required):

#### TRAVEL & ACCOMODATION DOCUMENTATION:

1. Boarding passes and itineraries; for all flights taken to and from the exchange destination. As per the tables above, only air travel at the lowest fare available/not exceeding the full cost of an economy airfare will be reimbursed.
2. Receipts for transportation; any transportation (taxi fare, bus fare, etc.) taken for the purpose of travel/relocation between the home city and exchange destination.
3. Receipts for accommodation; may include rent receipts, receipts for hotels used during travel/relocation to the exchange destination.
4. Any other receipts/supporting documentation for eligible expenses incurred while on exchange.

#### SUBSISTENCE SUPPORT DOCUMENTATION

5. To support a subsistence claim, a written memo signed and dated by the host-institution Department Head, or equivalent authority, shall attest the number of working days the visiting scientist attended the host institution.

**Please submit original documents by e-mail (if electronic documents are originals) and mail all physical receipts and other supporting documentation to the McDonald Institute. We advise that you take photocopies of all documentation for your own records/backup prior to submission.**

#### Reimbursement Process

1. Submit all required documentation as indicated above to the McDonald Institute Finance Officer no later than (14 business days) from the end date of the travel period.
2. Provide your contact information to which the cheque will be mailed.
3. Should you prefer an electronic fund transfer, you will need to provide (i) Bank Name (ii) Bank Address including City/Province/Country and Postal Code(iii) Account/IBAN (iv) SWIFT ID
4. Please contact the McDonald Institute Finance Officer with your preferred method of reimbursement (contact info below).
5. You will receive your reimbursement within (60 days/2 months) of submitting a complete claim.

#### Other Funding Opportunities

We highly encourage those applying for our programs to search additional sources of funding. If the application to the McDonald Institute is successful, we can issue a letter of support for applications to complementary funding agencies. Any additional funding sources that are obtained must be declared to the McDonald Institute.

#### Contacts

Please address any questions or comments to the McDonald Institute Administration team at:  
[admin@mcdonaldinstitute.ca](mailto:admin@mcdonaldinstitute.ca).