

Simplified Requisition Form

A - Is this a travel or non-travel related expense?

a. Travel (Reference # at <http://finance.ubc.ca/Treq-number>)

b. Non-Travel (Reference # at <http://finance.ubc.ca/Qreq-numer>)

Reference Number (copy and paste TR or Q number from link)

B - Payee Details

Employee ID or Student Number (if applicable)
Payee Name
Address
City
Province
Postal Code

F - Requestor Information

Name (your first name & last name)
Department
Phone Number
Email Address

C - Payment Information

Total Reimbursable (total claimed receipts/invoices, per diems & mileage)
SpeedChart /PG (attach breakdown if more than one SpeedChart or PG)
Handling Code (how the payment will be sent)

G - Authorization

I hereby approve the expenditure(s) as reasonable and appropriate within the budget against the PG(s) being charged, the expenses comply with UBC Policies and Faculty of Medicine Guidelines, and any services or goods expensed in this claim were received.

Supervisor Signature
Supervisor Name
Date Signed

D - Expense Details

Purpose of Expense (for travel include purpose of trip)

PG Manager or Delegate Signature (if different than Supervisor)
PG Manager or Delegate Name (if different than Supervisor)
Date Signed

E - Trip Details (to be completed if travel related)

Destination		
Duration	Trip Start Date	Trip End Date
Traveller Name		
Traveller Signature		

H - Additional Space (if needed)

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Instructions

A - If this is a travel related expense, you will need to obtain a TR requisition reference number and if it is a non-travel related expense, you will need to obtain a Q requisition reference number, at the provided link. Use this reference number when contacting your cluster team for questions on the status of claim.

B - *Payee Details* are required to indicate the name and address of the vendor that the payment must be made to. If this is for a UBC employee, the Employee ID must be indicated.

C - *Payment Information* Total Reimbursable field is for the total of all expenses, invoices, per diems, mileage, etc. that are included in the backup. All original receipts (for expense claims) or invoices (for purchases) must be provided. For per diems and mileage, please attach a detailed summary of the calculation. Note that per diems are only eligible when meals are not provided by a hotel, conference, airline, or other means. Refer to the Faculty of Medicine Travel Expense Guidelines, FoM Entertainment Expense Guidelines, UBC Policy 83, UBC Policy 84, and other applicable policies for eligibility of expenses.

C - *SpeedChart / Project/Grant* field is for instructing where to charge the expense. **If more than one speedchart (or PG) is being charged, please attach a receipt summary or other backup showing the breakdown where to charge each expense.**

C - *Handling Code* field is for instructing how the cheque payment should be sent. Employees and American Express default to Electronic Funds Transfer, all other payments are by cheque. To pickup cheque at Financial Services include your name and phone number, or to Campus Mail cheque to your Department instead of the payee include the name, department and campus mail address to forward cheque to.

D - *Expense Details* must provide detailed justification for the expense(s) or trip(s). For conference expenses please attach an agenda from the conference.

E - *Trip Details* must be completed for all travel expenses. If more than one trip is claimed, please attach a summary outlining the details of each trip.

F - *Requestor Information* must detail the contact information of person submitting this form.

G - *Authorization* must include one-over-one administrative level approval (ie. director Supervisor) of person receiving the payment or person benefitting from the expense. For example, if payable directly to a travel agency, the supervisor of traveler must sign if traveler is a UBC employee. PG Manager Signature is for authorization to charge expense to listed speed chart(s). Delegated signing authorities may also sign instead of PG Manager (ie. those who have PG level or Department level signing authority).