

Hints & Tips from the Corporate Compliance & Controls Monitoring Branch Travel Policy and your Expense Claim

January 8, 2014

BEFORE You Travel...

Review the [Government Travel Resource Centre](#) and [Core Policy and Procedure Manual \(CPPM\)](#)



Do you have approval?

- Do you have **approval** to travel from your Expense Authority?
- If you are travelling [Out of Province](#), have you completed a [FIN 99](#)?
- When should you apply for a Government [Corporate Travel Card](#)?



Have you done your research?

- Are there alternatives to business travel such as [audio or video conferencing](#)?
- Are you choosing lower [carbon emission](#) travel options?



Accommodation

Private

- Are you able to stay with family or friends? If so, are they located conveniently to your required destination? [CPPM 10.3.10 1.](#)


Commercial

- Have you reviewed the accommodation [guidelines](#) to become familiar with the accommodation [policy](#)?
- Have you researched accommodation to ensure your selection is listed on the [approved government listing](#)?

When reporting GHGs on your SMARTTEC, ensure you record each night's stay. (This also includes private accommodation.)



Vehicle

- Have you determined which vehicle ([government owned/leased](#), [personal](#) or [rental](#)) is most [economical](#) to use? When the most economical is not obvious, you are required to document the rationale or cost savings.
- If renting a vehicle, have you used a [CSA Vehicle Rentals](#)  to ensure the approved [government rates](#)?
- Have you informed the rental agency of their Corporate ID Number and that you are purchasing for the Provincial Government? All vehicle rental companies require renters to provide a corporate identification number when requesting a vehicle. Use of the Corporate ID Number will result in the terms and conditions of the CSA and correct rates being applied to the rental.
- Do you know what [insurance](#) to **avoid** purchasing when renting a vehicle? (Personal Accident, Collision Damage, Cargo or Personal Effects)

When reporting GHGs on your SMARTTEC, ensure you record all modes of [return trip](#) transportation.

Air Travel

- When reporting GHGs on your SMARTTEC ensure you record all [return trip](#) air
- Report GHGs on your SMARTTEC for airfare or other travel costs that are paid directly by the Ministry.

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DURING Travel...

Obtain all necessary documentation:

- Have you retained ALL receipts or documentation to support your reimbursement claim? If not, have you provided an explanation with your claim submission?

ENTERING iExpenses...

What NOT to enter on an iExpense claim:

- Reimbursement for relocation costs
- Airfare or other costs paid directly by the Ministry

If you are sharing costs with another employee, only one employee should claim for reimbursement
If you are claiming a shared receipt, reference the other travellers' claim in the justification for that line.

What to enter for Reason for Travel:

* Reason for Travel

- Why** and **where** (nearest city/town) you travelled. While the box looks small, you actually have up to 240 character spaces to use to describe this.

Claim detail ...

...should be timely and accurate. If the receipt spans multiple days, the correct number of days should be entered. (If you enter the number of days, and the total amount, the daily rate will calculate as an average amt/day automatically)

* Start Date	10-Jul-2008 <small>(example: 25-Apr-2008)</small>	* Start Date	10-Jul-2008 <small>(example: 25-Apr-2008)</small>
Daily Rate	900.00	Daily Rate	100.00
Number Of Days	1	Number Of Days	9
* Receipt Amount	900 CAD	* Receipt Amount	900.00 CAD

If you are prompted with: **The following required field does not have a value: City/Region** Use the dropdown arrow to select the nearest travel destination location you travelled to or indicate "other BC" / "other" if the location you travelled is not available.

RECORDING Travel GHGs...

SMARTTEC Attachment:

SMARTTEC

- [iExpenses and SMARTTEC](#): Be sure to electronically attach the emailed SMARTTEC PDF report to your iExpense claim. [CPPM 10.3.18](#)

Attachments: SMARTTEC_confirmation_0A0A0B0R6_2008-04-05.pdf (99 KB)

Thank you for completing your travel details in SMARTTEC. Attached is a PDF with your travel details and travel confirmation number. Save this PDF to your network drive. If there is an expense claim associated with this travel then attach this PDF to your iExpenses travel claim.

This Email address is not monitored.

- Do **NOT** change the file name during transfer. SMARTTEC attachments are recognized in iExpenses by their file name e.g. SMARTTEC_confirmation_0A0A0B0R6_2008-04-05.pdf.
- In iExpenses, at Step 4 of 4 just prior to submitting you will find the button to **Add** the SMARTTEC PDF:

General Information

Name	TRAVELLER, NAME	Receipts Status	Required
Expense Dates	06-MAY-2008 - 06-MAY-2008	Attachments	None <input type="button" value="Add"/>
		Report Total	50.00 CAD

If your claim does not comply with policy, evidence of prior approval and/or justification for the decision **must** be included with your iExpense claim.

Available at: <http://gww.fin.gov.bc.ca/gws/OCG/3CMB/>

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SMARTTEC vs. iExpense – Why do I have to go into two systems?

These are two separate applications created for two separate and distinct purposes.

Not all travel related expenses may have an iExpense claim however all GHGs must be recorded into SMARTTEC to meet *the B.C. Government commitment to carbon neutral business travel.*

iExpenses is a web-based Oracle application used to enter and submit expense reports for **reimbursement** of business travel expenses that an employee has incurred out-of-pocket.

SMARTTEC is a web-based tool for employees to use to calculate, track and **report greenhouse gas emissions** (GHGs) for business travel. **SMARTTEC is designed to record every leg of your journey regardless of the means by which the transaction was paid (i.e.: pre-paid airfare, ALTs).** The form has a variety of fields to enter your travel details:

Purpose of Travel Purpose of Travel ▼
Traveler's Name ▼
Date ▼
Travel Mode ▼ (e.g. taxi, ferry, airplane)
To ▼ (e.g. Vancouver)
From ▼ (e.g. Victoria) Flight # is optional ▼

Km ▼ or **Distance** ▼ will automatically calculate as per the travel details you enter. If you know the specific kilometres (Km) traveled you can change the Km field. If a City is NOT in the drop-down list, click **Other** ▼ and refer to the link provided to calculate your distance.


Travel information to be reported in SMARTTEC: *(These elements incur GHGs and must be reported)*

Trip and Return Trip: *Include each leg of your trip separately (e.g. in a vehicle trip between Victoria and Vancouver return, record ferry as two separate legs).*

Travel Mode:



Bus/train: Bus-other 

Ferry: *each person travelling must record the ferry information* 

Fleet vehicles **

* When a ride is shared (vehicle, taxi or rental car), only the person who pays the out-of-pocket expenses for the ride will need to enter that leg of the journey **however each person** travelling must record their own ferry information into SMARTTEC.

** no GHGs will be associated with this entry as fleet vehicle GHGs are already captured through other means, recording fleet assists in telling the trip story when fleet is included as a component of your trip.

** if fleet emissions are the **only** GHG emissions associated with a day-trip travel claim, then a SMARTTEC report is **not** required.

** Fleet is included in the drop-down menu. Ensure you select Fleet (and not standard vehicle) to avoid over-stating GHGs.

Accommodations:

- City
- Hotel (some hotels have registered Green status, and may be selected from a list of values) Select the hotel city, and name if it is available; otherwise select the type of lodging
- Private lodging
- Count of each of the nights stayed for business travel



Hotel Provider

Please Select ▼
Please Select
Bed & Breakfast
Other
Private Accomodation
Blackbird Bay B & B
Overlander Hotel
Sandman Inn & Suites Williams L
Super 8 Motel, Williams Lake, BC

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