



# Expense Rules

**POLICY**

**Number: AD 5-10**

**Manual:** Global Administrative Manual

**Approval Date:**

March 19, 2018

**Section in Manual:** Finance

**Approved by:** Infrastructure Quality Committee

**Cross References:** AD 5-11

## Purpose, Application and Scope

The purpose of this Policy is to set out expense rules where expenses are reimbursed from public funds.

The expense rules apply to any person in the organization making an expense claim, including the following:

- Board (includes Board Committee members as appropriate)
- Employees, and
- Consultants and contractors engaged by the organization, providing consulting or other services

## Principles

This Policy is based on four key principles:

### A. Accountability

Organizations are accountable for public funds used to reimburse travel, meal and hospitality expenses. All expenses support business objectives.

### B. Transparency

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Organizations are transparent to all stakeholders. The rules for incurring and reimbursing travel, meal and hospitality expenses are clear, easily understood, and available to the public.

**C. Value for Money**

Taxpayer dollars are used prudently and responsibly. Plans for travel, meals, accommodation and hospitality are necessary and economical with due regard to health and safety.

**D. Fairness**

Legitimate authorized expenses incurred during the course of the business of an organization are reimbursed.

## **Policy Statement**

### **Prior Approval**

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Staff must receive prior approval for all paid leaves of absence (whether for meetings/business or education) and for any expenses that St. Joseph’s Care Group shall incur.

The Director/Manager or the VP/President and CEO of the functional centre with the appropriate budgeted funds must give prior approval and authorize the subsequent reimbursement or expense as approved.

During this prior approval process, the arrangements, including method of travel, anticipated expenses and cost-sharing arrangements must be agreed upon.

### **Expense Reimbursement**

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St. Joseph’s Care Group (SJCG) reimburses expenses for business or education, consistent with normal living standards, provided they are authorized, in accordance with the policy and procedures governing “Expense Rules”, and supported by original detailed receipts.

Every employee on authorized business or travel is responsible for retaining original receipts that detail the nature of the expense, the date, the location and taxes incurred.

Credit or debit card slips are not receipts and are not sufficient documentation to expense reimbursement. To be considered for reimbursement, all requests must include the original detailed receipt including types of expenses, applicable taxes and gratuities. In the rare case where this is not feasible the alternate supporting documentation for the expense needs to be reviewed and, if approved for payment, initialed by the appropriate next level of signing authority prior to submission for reimbursement.

It is the responsibility of the person submitting the expenses for reimbursement and the Approval Authority to submit complete, accurate and approved expense claims in accordance with SJCG policy and procedure governing “Expense Rules”.