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1. PURPOSE
The purpose of Mohawk College’s (the “College”) Travel Expenses and Hospitality Policy (“Policy”) is to:

- set out rules and principles for the reimbursement of business related expenses to ensure fair and reasonable practices
- establish an accountability framework to effectively guide college staff in respect to the reimbursement of expenses
- provide transparency of the College’s travel and hospitality policy

2. APPLICATION AND SCOPE
The expense rules in this policy apply to the following individuals:

- members of the College’s Board of Governors
- any person volunteering for the College
- employees of the College
- consultants and contractors engaged by the College
Consultants and other contractors engaged by the College shall not be reimbursed for expenses other than reasonable transportation costs which will be reimbursed at the current kilometric rate for college employees. To the extent that this provision conflicts with any part of an agreement entered into by the College with a consultant or a contractor, this provision will prevail.

Any funding agreement entered into by the College is deemed to include the requirements of this policy. Where an agreement addresses the subject matter of this policy, at a minimum this policy should be followed. If the agreements have more stringent requirements than this policy, they are also to be followed in order not to jeopardize the funding.

This policy does not prevail over legislation or a collective agreement or other terms and conditions of employment between the College and its employees, in the event of any conflict or inconsistency.

3. DEFINITIONS

“Approver” means the claimant’s supervisor with the authority to approve expense claims.

“Claimant” means any individual set out in section 2 of this policy and who is making a claim under the terms of this policy.

“Home Campus” means the campus where an employee is regularly scheduled to report to work for the majority of the work week.

“Hospitality” means the provision of food, beverage, accommodation, transportation and other amenities paid out of public funds to people who are not engaged in work for any designated Broader Public Sector agency under the Broader Public Sector Accountability Act 2010 or provincial ministry or agency covered under the Ontario Public Service Travel, Meal and Hospitality Expenses Directive.

“Itemized Receipt” means an original document identifying the vendor with the date and detailed breakdown of each expense item paid by the claimant.

“Managerial Discretion” is an approver with the administrative authority to make decisions and choices with some degree of flexibility, while maintaining compliance with this policy. There is no discretion to depart from the principles, spirit and the mandatory requirements of this policy. Decisions must be able to stand up to scrutiny by the auditors and members of the public and must be fair and equitable.

“Travel” means authorized business travel and does not include commuting between a claimant’s residence and the claimant’s home campus at Mohawk College.

4. PRINCIPLES
The policy is based on four key principles:

A. Accountability – The College is accountable for public funds used to reimburse travel, meal and hospitality expenses. All expenses support business objectives.
Since expense accounts can become matters of public record through audit or other means, expenses should be incurred and claimed in a manner that is publicly defensible and will not harm the college’s reputation as a good manager of its resources.

B. Transparency – The College is transparent to all of its stakeholders and especially to the members of the Hamilton community who it serves. The rules for incurring and reimbursing travel, meal and hospitality expenses are clear, easily understood, and available to the public.

C. Values for Money – The College’s dollars are used prudently and responsibly. Plans for travel, meals, accommodation and hospitality are necessary and economical with due regard for efficiency of operations and circumstances surrounding every particular claim.

D. Fairness – Legitimate, authorized and documented expenses incurred during the course of the business of the College ought to be reimbursed.

5. ACCOUNTABILITY AND COMPLIANCE

5.1 Accountability
This policy is approved by the College’s Board of Governors. The Senior Leadership Team (SLT) has the authority to establish additional rules in relation to this policy. Any additional rules should be consistent with those laid out in this policy and necessary to meet specific operational needs.

5.2 Compliance
The Chief Financial Officer is authorized to ensure that information within this policy is applied.

5.3 Managerial Discretion
Approvers will, from time to time, have to exercise managerial discretion in determining the legitimacy of an expense claim. In so doing, approvers should make decisions that show some degree of flexibility, while maintaining compliance with this policy and the rules contained therein. When exercising managerial discretion, the rules on documentation set out in section 6.4 should be followed so the rationale will be included in the claim file.

When a situation arises and discretion needs to be exercised in approving a claim, approvers should be judicious and consider the following questions before making a determination:

- Is the expense claim in pursuance of a legitimate College related business?
- Would the expense claim be able to stand up to scrutiny by an auditor?
- Would the expense claim be acceptable to members of the general public?
- Is the expense claim properly documented, and if not, is there sufficient explanation as to the deficiency in documentation?
- Is it fair and equitable to provide reimbursement?
- Is the amount of the claim reasonable and appropriate given all of the circumstances?
If the answer to any of these questions is “no”, the approver should reject the claim, or send the claim back to the claimant for clarification or seek guidance from the Chief Financial Officer about the appropriate next steps.

6. RULES

6.1 Alcohol
Any expense with respect to alcohol shall not be claimed and will not be reimbursed unless it falls within the ambit of section 6.2.

6.2 Hospitality
Unless otherwise provided in this policy, any function involving only people set out in section 2 is not considered hospitality and cannot be reimbursed. Examples of functions that are not reimbursable would be, but are not limited to: office social events, retirement parties and holiday lunches.

Hospitality may be extended in an economical and consistent manner when it:

- facilitates college business
- is in pursuance of donor stewardship and/or cultivation
- is considered desirable as a matter of courtesy or protocol

Expenses that do not fit the definition of hospitality and within the context set out in the three points above shall not be reimbursed.

Only alcohol expenses associated with a “hospitality” event within the meaning of section 3 may be reimbursed.

6.2.1 Individuals Authorized to Approve Alcohol Related Expenses
Reimbursement for any alcohol related expense claim falling within the rules under 6.2 will require the approval from the President or General Counsel and Corporate Secretary. Where the claim is made by the President, the Chair of the Board of Governors will be required to approve the expense claim. These approval powers cannot be delegated.

6.2.2 Special Status for Service of Alcohol at Hospitality Events
For some academic programs offered at the College (e.g. Event Management - Convention and Meeting Program), the service of alcohol at hospitality events may be considered integral to their business. To ensure that the approvals process does not have an undue negative effect on the ability of these programs to conduct business, they may apply for special status that would allow Mohawk Executive Group (MEG) to approve the service of alcohol at hospitality events in advance. Only MEG can approve special status designation.

6.3 Gift Giving
Appropriate token gifts of appreciation may be offered in exchange for gifts of service or expertise to individuals who are not engaged in work for the College.
6.4 Documentation Required
Reimbursement claims covered under this policy must be accompanied by appropriate original (not photocopied) itemized receipts. As a general rule, claims without a receipt will not be reimbursed. Credit card statements or debit card receipts do not qualify as original itemized receipts. Good record-keeping practices must be maintained for verification and audit purposes.

6.5 Individuals Making Claims (Claimants)
1. Claimants must obtain any required approvals before incurring expenses (see 6.7.1).

2. Employee claims for expenses incurred while on College business must be submitted using the Electronic Expense System which can be accessed through MyMohawk. All other individuals listed in section 2 of this policy have to complete a paper expense claim form.

3. It is the responsibility of the claimant to complete the expense claim, print a copy, attach all original itemized receipts and submit the claim for approval to his/her supervisor. If the information, receipts or calculations are missing, the form will be returned to the claimant for completion.

4. In circumstances where documentation evidencing a reasonable expense is lost or unavailable, the claimant must provide a written explanation. In such circumstances, the approver must act judiciously in exercising managerial discretion pursuant to the provisions of section 5.3.

5. It is the responsibility of the claimant to enter all expenses and kilometric claims in chronological order whenever possible to prevent duplicate claims.

6. For expenses incurred in other than Canadian dollars, claims for reimbursement must be expressed in Canadian dollars at the rate of exchange in effect at the date the expense was incurred. The exchange rate must be evidenced by one of the following:

   - credit card statement showing the exchange rate
   - foreign currency purchase receipt from a bank or an exchange agent
   - print out of exchange rate from Bank of Canada for the date the expense was incurred

7. The claimant is responsible to repay the College in the event of any overpayment or payment made in error. Any such payment will be deemed as a debt owed to the College.

8. Advance travel bookings for hotels, flights and conferences should be made using the employee’s purchasing card. Management will encourage employees to have the administrative assistants in their departments use purchasing cards for these purchases if an employee does not have a purchasing card.

9. If leaving employment with the college, the claimant must submit any claims for expenses before leaving the organization.
10. Loyalty points accumulated through College related purchases such as participation in frequent flyer or other loyalty programs is permitted provided that the claimant:

- chooses the most cost effective accommodation or method of travel, and
- uses the corporate purchasing card to pay for all business expenses where possible.

Loyalty points can be redeemed at the user’s discretion; however, they cannot be redeemed for cash by using the points for business purposes and then submitting a claim for reimbursement. Claimants are responsible for complying with income tax rules and regulations regarding the accumulation of loyalty points on business related expenses and any subsequent personal use of them when using their personal credit cards, rather than the corporate purchasing card.

6.5.1 Prohibitions
The following list is provided as a general guideline for non-eligible expenses. However, this is not an exclusive list and subject to change from time to time according to legislation or ministry directives. The college may reject any expense claims that are considered unreasonable or not in compliance with college policies. Always ensure that all purchases are in compliance with the College Purchasing Policy (CS-1202-2011).

Without limiting the forgoing list, the following expenses are not reimbursable under this policy:

- service charges related to the late payment of credit card or any other surcharges relating to an expense which the claimant ought to have avoided, but failed or refused to do so
- charges related to fines for parking and traffic related offences
- additional costs for travelling with a companion, making voluntary changes to existing travel arrangements, ‘no show’ charges unless incurred as a result of business related circumstances or extenuating personal circumstances
- expenses related to attendance at political fundraising events
- information technology related devices (e.g. computers, laptops, phones, tablets, and iPads)
- personal trip expenses incurred immediately before/after a business trip, the portion of expenses pertinent to the personal trip should be clearly separated and excluded from the claim (e.g. flight costs, airport parking, hotel, etc.)
- any expense savings by use of coupons, personal travel rewards points or expenses covered by vendor/external research funding agency/insurance company
- home internet
- expenses related to gas, repair and maintenance, and road side assistance membership for personal vehicles. Such expenses are covered by kilometric claims
- per diem allowances of any kind
- any consulting services as defined in the college’s Purchasing Policy (CS-1202-2011)
- any other expense expressly set out in this policy
6.6 Individuals Approving Claims (Approvers)

1. Approvers are required to exercise due diligence and common sense when reviewing expense claims. Approvers are further required to provide approval only for expenses that (a) were necessarily incurred in the performance of College business; and (b) include all appropriate documentation evidencing the claim made unless there is a written explanation that clearly sets out the reason for the missing or unavailable documentation.

2. Approvers are required to ensure that all transactions are charged to the correct Fund, Org, Account, Program, Activity and Location (FOAPAL).

3. Approvers are prohibited from approving their own expenses. The expenses of the President shall be approved by the Chair of the Board of Governors.

4. Expenses for a group can only be claimed by the most senior person present at the event such that an individual is prohibited from claiming an expense that is wholly or partially incurred by the approver. By way of example, a MEG member who reports to the President cannot submit a lunch meal expense incurred in furtherance of College business if that expense includes the cost of the President’s lunch. Instead, the President should claim the lunch as an expense and submit it for approval by the Chair of the Board of Governors.

5. Managers are responsible to ensure prepaid travel expenses are completed as planned or the college is reimbursed for any prepaid fees where activities were subsequently cancelled and monies refunded.

6.7 Travel

This policy addresses requirements related to reimbursement of travel costs, including food and accommodation costs, and other business expenses which meet College eligibility requirement. For the purpose of this policy, travel does not refer to a person’s regular commute to work. Expenses related to a person’s regular commute are not reimbursable.

6.7.1 Approvals for Travel

The following chart identifies the level for approvals for travel for everyone covered by this policy. Approvals for travel should be obtained before incurring any travel expenses. Note that these are the levels for approving travel, not for approving any expenses related to travel.

<table>
<thead>
<tr>
<th>Traveller</th>
<th>Within Ontario</th>
<th>Within Canada</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board Chair</td>
<td>N/A</td>
<td>Vice Chair</td>
<td>Vice Chair</td>
</tr>
<tr>
<td>President</td>
<td>N/A</td>
<td>Board Chair</td>
<td>Board Chair</td>
</tr>
<tr>
<td>MEG member</td>
<td>N/A</td>
<td>President</td>
<td>President</td>
</tr>
<tr>
<td>Employee</td>
<td>Supervisor</td>
<td>MEG member</td>
<td>President</td>
</tr>
</tbody>
</table>

International travel is considered to be any country other than Canada. MEG member is considered to be any member of the Mohawk Executive Group other than the President.

Delegation of authority with respect to travel approvals is prohibited.
6.7.2 Rules for Travelling

1. Prior to requesting approval to travel, individuals should determine whether other options for meetings would be practical under the circumstances such as audio, web or video conferencing.

2. The method of travel, the type of hotel accommodations chosen, meal expenses and any other related expenses incurred during travel must balance cost effectiveness with practicality given the entire context of the trip. Good judgment and common sense should be exercised in this regard by both the claimant and the approver.

3. If the claimant is eligible to use a purchasing card, the claimant should use it wherever possible to pay for appropriate business related travel expenses.

4. Claimants are responsible to secure passports, visas, immunizations, and medications, as appropriate before the travel date. The College may reimburse the claimant for any such related expenses where reasonable, appropriate and accompanied by the requisite documentation.

5. In cases where spouses or partners are accompanying the claimant on College business, arrangement may be placed at the same time and the College must be reimbursed for any extra costs.

6. When there is a personal trip immediately before/after a business trip, the portion of expenses pertinent to the personal trip should be clearly separated and excluded from the claim (e.g. flight cost, airport parking, etc.)

6.7.3 Cash Advances

1. A cash advance request can be made by using the Request for Expense Claim Advance form, available on the Payroll Services page of MyMohawk. Reasons must be provided as well as the estimated completion date of the event/trip.

2. Advances will be included with the employee’s pay deposit and therefore must be requested 9 working days prior to the pay date required.

3. A cash advance must be settled within 5 days of return from travel. The cash advance should be settled by offsetting claims for reimbursement with supporting documents and/or by cash repayment. The expense claim including all approvals and receipts must be submitted to Payroll Services within 5 days of return from travel.

4. At the conclusion of employment, the college reserves the right to deduct any outstanding cash advances from the final salary payment.

6.8 Insurance

The College will reimburse claimants for the following insurance costs related to College approved business:

1. Out-of-country medical and health insurance for travel outside of Canada if not covered by existing employee benefits or blanket insurance policies. It is the
traveller’s responsibility to contact Sun Life to determine whether coverage provided will meet all of their personal medical needs.

2. Group Business Travel Accident insurance and excess out-of-province/country medical insurance is covered through the College for staff members who have received authorization from their manager to travel on College business for a period up to 60 consecutive days. Travel for longer periods will require special approval from the insurance company. No travel is authorized under College insurance to countries that are banned by Global Affairs Canada.

6.8.1 Use of Personal Vehicle
Staff members must ensure that they have appropriate insurance including coverage for business use of the vehicle. College insurance does not cover the use of staff-owned automobiles for College business. The college will not reimburse the costs of insurance coverage for business use, physical damage or liability. The college is not responsible for reimbursing deductible amounts related to insurance coverage. In the event of an accident, you will not be permitted to make a claim to the college for any resulting damages. The kilometric reimbursement rate is calculated to cover vehicle expenses including the cost of insurance.

6.9 Telecommunication
College owned cellular phones may be used for business purposes when travelling. It is the claimant’s responsibility to arrange for a travel package to be added to his/her plan to handle long distance or roaming charges. Additional details are provided in the Wireless and Cellular Technology policy (CS-1503-2007).

Claimants without a cellular phone are expected to use the least expensive means of communication while travelling and seek reimbursement accordingly.

6.10 Transportation

6.10.1 Personal Vehicle
Personal vehicles should be used where it is the most practical or economical mode of travel.

6.10.2 Kilometric Reimbursement and Rates for Personal Vehicle Usage
1. Automobile kilometric claims are permitted for authorized travel on college business using a personal vehicle to off-site locations. Reimbursement for business travel will be provided for the distance from the employee’s home campus location to the business-related destination. If you are travelling to multiple locations in a work day, claim kilometres from your home campus to the first location, and then kilometres from each destination thereafter, and from the final location back to your home campus.

2. The reimbursement amount per kilometre will be in accordance with the rates as established by the college from time to time.

3. Kilometres should be calculated per trip with an explanation of each travel destination.
4. Expense claims must be submitted with distances calculated in kilometres. Approvers should consult Google Maps to substantiate kilometres travelled. Please refer to section 5.3 for further detail on managerial discretion.

5. For the current reimbursement rates, please refer to the Kilometric Reimbursement Rate document, posted on MyMohawk, Payroll Services page.

6.10.3 Intercampus standard Kilometrage
Staff may be required to travel to a campus other than their home campus. Standard intercampus kilometrical rates have been set in the chart below for our four main campus locations and should be used when claiming kilometrical reimbursement when travelling to campuses other than the employee’s home campus. When travelling to a campus location not listed below, please follow the instructions provided in section 6.10.2 above.

<table>
<thead>
<tr>
<th>Between Campus</th>
<th>Standard One-way Kilometres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fennell and IAHS</td>
<td>8 km</td>
</tr>
<tr>
<td>Fennell and Stoney Creek</td>
<td>24 km</td>
</tr>
<tr>
<td>Fennell and Mount Hope Airport</td>
<td>14 km</td>
</tr>
<tr>
<td>Stoney Creek and IAHS</td>
<td>25 km</td>
</tr>
<tr>
<td>Stoney Creek and Mount Hope Airport</td>
<td>27 km</td>
</tr>
<tr>
<td>IAHS and Mount Hope Airport</td>
<td>20 km</td>
</tr>
</tbody>
</table>

6.10.4 Airplane
Air travel is permitted if it is the most practical and/or economical way to travel. Economy class seating is the standard option with the exception of the conditions set out for international travel in section 6.10.5 below. Any upgrade charge other than economy class is at the personal cost of the claimant. There will be no reimbursement for extra costs associated with air travel such as lounge access, WiFi, movies, headsets or alcohol. Reasonable expenses for luggage and advance seat selection fees are permitted. Please refer to section 5.3 for further detail on managerial discretion.

6.10.5 International Air Travel
If travelling outside of Canada, in addition to the obligations set out elsewhere in this policy, the claimant must obtain prior written approval demonstrating the critical value of travel for college priorities and interests, and how the travel will produce a benefit for the college. The claimant must complete an “Approvals for Travel Outside of Canada” form (Attachment 1) and attach approved copy to their expense claim. Documentation showing detailed itemization of anticipated expenses must be provided as part of the approval process.

Economy class seating is the standard option for international travel. Business class seating may be permitted on international flights with prior written approval from the President as long as the one-way flight time exceeds 5 hours (not including stopovers). This approval is incorporated into the revised form – Approvals for Travel Outside of Canada (Attachment 1). For international travel involving the President, prior written approval of the Chair of the Board of Governors will be required.

6.10.6 Train
Travel by train is permitted when it is the most practical and/or economical way to travel. Train travel within Canada must be made on coach class economy fare. For
international train travel, seating purchases should be at the Canadian equivalent to coach class.

**6.10.7 Rental Vehicle**
Rental vehicles are permitted for travel where they are more cost effective than using a personal vehicle. When renting a vehicle, a compact or intermediate model or its equivalent is the standard. Luxury and sports vehicles are prohibited unless the rental rate is the same as compact or intermediate model.

When renting a vehicle for College approved business purposes within Canada for a duration of less than 48 days, claimants must rent the vehicle in the name of the College and pay for the rental costs with their College purchasing card, all insurance offered by the rental company should be waived. If the claimant does not hold a College purchasing card, the vehicle must be rented under the claimant’s name and all insurance offerd by the rental company must be purchased.

**6.10.8 Parking and Tolls**
Reimbursement is provided for necessary and reasonable expenditures on parking, as well as tolls for bridges, ferries and highways, when driving on college business. The appropriate original itemized receipts for such costs will be required before reimbursement will be provided. Parking costs incurred from a person’s regular commute to work will not be reimbursed.

The use of toll highways, including but not limited to Highway 407 (ETR), is acceptable. Employees will be reimbursed for the cost of travel on the toll road. If an employee does not have a transponder the cost of the video toll fee per trip will be covered. The college will not reimburse for any costs related to an employee’s personal account (i.e. administration fees will not be reimbursable).

**6.10.9 Taxis and Public Transit**
Travel by taxi and public transit (i.e. bus/subway) is permitted where it is the most economical or practical means of transportation. Reimbursement will require original itemized receipts including gratuity.

**6.11 Accommodation**
Original itemized receipts for accommodation costs are required. Receipts will require a detailed breakdown of any lump sum charges (i.e. incidental expenses and room service charges). Reimbursement will be made for single accommodation in a standard room.

There will be no reimbursement for the extra costs associated with hotel suites, executive floors or concierge levels when travelling unless it is required for hosting outside guests or represents a more effective and economical alternative than paying for other hotel facilities or services.

Reasonable costs associated with internet and telephone charges are also reimbursable. Please refer to section 5.3 for further detail on managerial discretion. Dry cleaning and laundering expenses will be reimbursed on overnight trips of five days or more in duration. Original itemized receipts are required for reimbursement.
Claimants will not be reimbursed for movie or game rentals, bar service, and other hotel services such as health clubs, personal grooming and spa services, etc. Such costs, if incurred, should be set out in a separate invoice.

6.12 Meals
Reasonable and appropriate meal expenses, with original itemized receipts may be reimbursed. Credit card statements or debit card receipts do not qualify as original itemized receipts. Taxes and gratuities should be included as part of the receipt. Alcohol cannot be claimed and will not be reimbursed as part of a travel or meal expense.

Reimbursement is for restaurant/prepared food only. Reimbursement will not be provided for meals consumed at home or included in the cost of transportation, accommodation, seminars or conferences.

Reasonable costs for meals may be reimbursable where the meal expense is part of the events listed under point 6.2 of this policy.

In reviewing meal reimbursement claims, approvers should be mindful that the amount of the claim is reasonable and appropriate given all of the circumstances surrounding the event.

6.13 Purchase of College Supplies
Whenever possible, the college’s preferred vendor should be used for purchasing office supplies to receive discounted pricing. Contact the Manager, Purchasing Services for further information surrounding the preferred vendor’s online ordering process.

7. SPECIFIC LINKS
Broader Public Sector Accountability Act 2010
Broader Public Sector Expenses Directive – Effective April 1, 2011
Ontario Public Service (OPS) Travel, Meal and Hospitality Expenses Directive
– Effective January 1, 2017
CS-1002-2009 – Purchasing Card Policy
CS-1202-2011 – Mohawk College Purchasing Policy
CS-1502-2002 – Acceptable Employee Use of IT Resources Policy
CS-1503-2007 – Wireless and Cellular Technology Policy

8. ATTACHMENTS
Attachment 1 – Form: Approvals for Travel Outside of Canada
Attachment 1 – Form: Approvals for Travel Outside of Canada

APPROVALS FOR TRAVEL OUTSIDE OF CANADA

EMPLOYEE IDENTIFICATION
Name: 
Title/Department: 
Email: 

DETAILS OF TRAVEL
Date of Travel: 
Location: 
Purpose for Travel: 
Benefit of travel to College: 

Approvals for Travel (Reference Corporate Policy Number CS-1000-2013; 6.7.1.)
The following chart identifies the level for approvals for travel outside of Canada. A MEG member is considered to be any member of the Mohawk Executive Group other than the President. Note that these are the levels for approving travel, not for approving any expenses related to travel.

<table>
<thead>
<tr>
<th>Traveller</th>
<th>Approval Required</th>
</tr>
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<tbody>
<tr>
<td>Board Chair</td>
<td>Vice Chair</td>
</tr>
<tr>
<td>President</td>
<td>Board Chair</td>
</tr>
<tr>
<td>MEG Member</td>
<td>President</td>
</tr>
<tr>
<td>Employee</td>
<td>President</td>
</tr>
</tbody>
</table>

For air travel, approval is for economy class only; if an upgrade is requested check the box below to request the president’s approval.

☐ PRESIDENT’S APPROVAL FOR UPGRADE

Employee [first name] 
Signature Date

Supervisor [first name] 
Signature Date

President [first name] 
Signature Date

Chair, Board of Governors [first name] 
Signature Date

Vice Chair, Board of Governors [first name] 
Signature Date

Please attach approved copy to Expense Claim/PCard Summary

Finance Department Form revision date: 2010-10-04

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1 This form can be downloaded from MyMohawk