

## Alcohol Expense Reimbursement Guidelines

Purpose: This document outlines the eligibility and processes associated with the allocation of department funds in support of events involving alcohol expenses. The Department of Immunology acknowledges the role moderate alcohol consumption in conventional hospitality practices but adheres to guidelines for restricted reimbursement due to its status as a publicly funded educational institution.

### Alcohol

- Alcohol expenses will not be reimbursed for certain activities such as but not limited to, educational/teaching activities for students, and/or fellows and regular in-house meeting.
- Eligible alcohol expenses include celebrations and/or special events, special-purpose business meeting and the entertainment of guests with prior written approval from the Department Chair.

### Obtaining Approval

- Approval for purchase or service of alcohol for event outside of the pre-approved regular schedule event must be obtained in writing from Department Chair before the event.
- Any on-campus event, alcohol **MUST** be purchased through Campus Beverage Services and by licensed, trained staff in accordance with the Liquor License Act:  
<https://campusbeverage.utoronto.ca/our-policies/>
  - o If there is confusion about who the alcohol must be purchased from, please contact the department Business Manager.

### Event, Meeting or Hospitality

- Reimbursement for alcoholic beverages is based on a maximum of 'one drink per person'. Only reasonable alcohol consumption is reimbursable.
- **A minimum of 2 attendees must be present.**
- **A bottle of wine should only be purchased if 4 or more attendees are present at the dinner**
- Note: that this alcohol guideline mainly applies for events hosted by department funds because most funding agencies do not allow alcohol reimbursements. However, if you plan to use grant funding for alcohol consumption, you must discuss with the department Business Manager to ensure eligibility **prior** to any alcohol purchase.
- Whenever possible, drink tickets should be used.
  
- Quantity and pricing guidelines are outlined in the chart below: please note that the price point indicated below is the maximum price per person, the department will be reimbursed.

Beverage & Quantity	Price Point (maximum)
750ml bottle of wine = 4 drinks	\$70.00 for 1 bottle of wine*
1 standard glass per person	\$17.50 for 1 standard drink*
<i>*amount before tax</i>	

## Payment

- Event should be invoiced to the Department of Immunology whenever possible to avoid personal credit card charges.
- In case where invoicing is not possible, the most senior staff in attendance should cover the expenses.

## Submitting invoice:

- Submit the itemized invoice along with the following documents to the Business office:
  1. Clear documentation as to the purpose of food and/or beverage expenses. If possible, please ask vendor to separate the **alcoholic purchases from the food and other additional service charge (such as gratuity)**.
  2. A list of first and last names of the individuals in attendance.
  3. An invitation email print-out or flyer as supporting documentation
- Invoices will not be reconciled until after the event has occurred.

## Submitting receipts for Personal Reimbursement:

- Complete the reimbursement form on <https://immunology.utoronto.ca/forms> (if you are not on UofT payroll)
- Complete the reimbursement form on ERDD (<https://easi.its.utoronto.ca/administrative-management-systems/expense-reimbursement-direct-deposit-erdd/>) (active employees on UofT payroll); Sign the form as claimant and submit to the appropriate authority for approval, along with:
  1. All original receipts
    - If credit card or debit card is used, a redacted credit card/bank statements is required as proof of payment with the first and last name of the individual and the last 4 digits of the card used
    - Itemized original documents detailing purchases and taxes must be provided.
    - Food, and additional service charges (such as gratuity) should be provided on one receipt.
    - **All alcoholic purchases should be provided on an additional receipt.**
    - Credit card receipts may be used to substantiate gratuities where applicable.
  2. Clear documentation as to the purpose.
  3. A list of first and last names of the individuals in attendance.
  4. An invitation email print-out or flyer as supporting documentation.
- Once approved by the appropriate authority, the documentation will be forwarded to the business office for processing.
- After the reimbursement has been entered into the system you will receive a cheque within 2 – 3 weeks. The cheque will be delivered to the address indicated on the reimbursement form.
- Direct deposit will be arranged for active employees who are on the U of T payroll system.