

How to Travel

School of Graduate Studies in the Health Sciences

2019-2020

New Terms to Know

- **Cash Advance** – Cash Advances are given before travel to cover various travel costs; the traveler will owe back to Accounting/Travel any portion of advances that are not spent during travel. Cash Advances will be mailed to the student's address 20 days prior to travel via check.
- **Spend Authorization** – a.k.a, "Travel Request"; Spend Authorizations must be completed before travel and include all travel documents (abstracts, conference brochures, all receipts)
- **Prior to Travel Expenses (PTE)** – PTEs are any expenses you've incurred before the trip (i.e., airfare, conference registration fees, abstract fees, etc.) that you will be reimbursed for after your Spend Authorization is approved
- **Expense Report** – Expense Reports must be completed after travel and include all expenses incurred while travelling; Expense Reports do not include any PTEs that have previously been reimbursed.
- **Third-Party Funding** – extra costs covered by a department/grant/scholarship, not the Graduate School

The Graduate School will only submit a student's travel documents if the travel is covered by Graduate School travel program funds

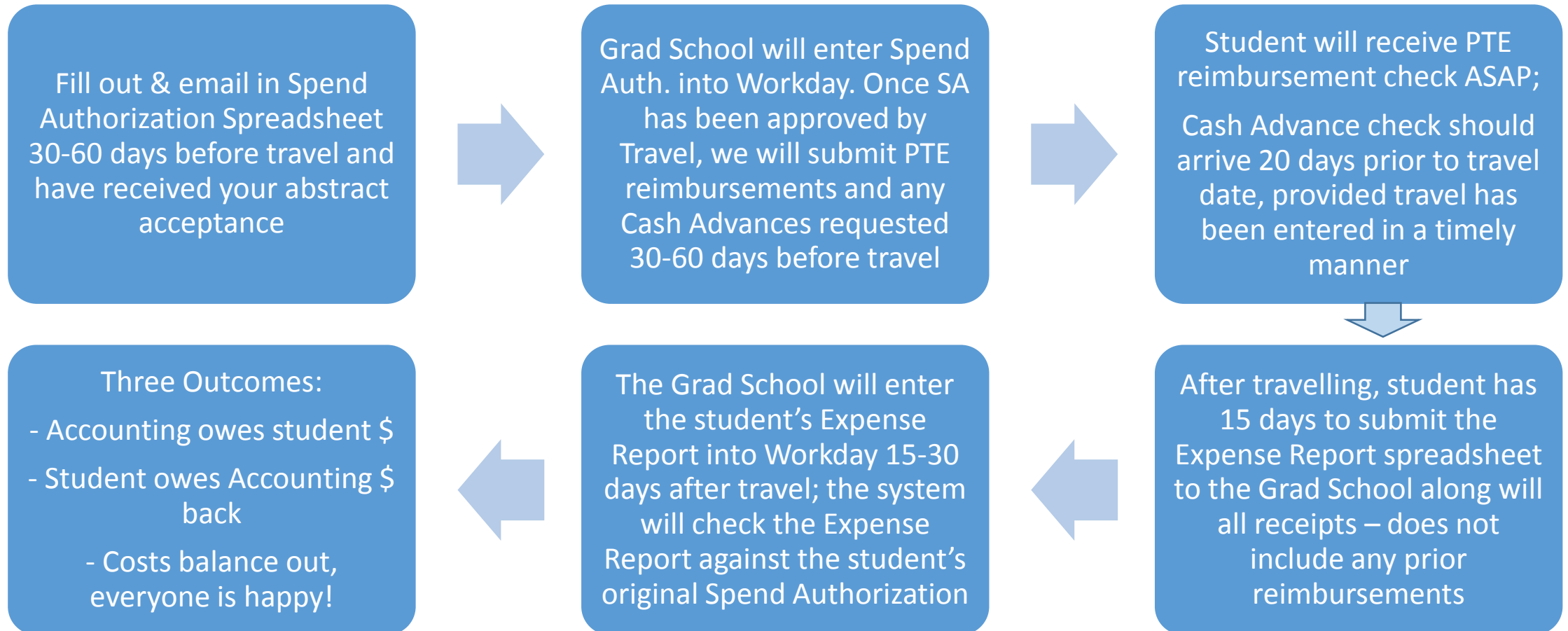
Graduate School Trainee Travel Program

- The Graduate School will pay up to \$1,500 in student travel expenses (attending conferences, presenting posters, etc.)
- Students may utilize travel coverage once per academic year (June – May); if students are funded by a pre-doctoral grant, they may travel one additional time with Grad School funds
- Any expenses above the \$1,500 funding must be covered by:
 - Departmental Funding
 - Grants
 - Personal Funding

 Third-Party
Funding

It is the student's responsibility to delegate expenses on the Spend Authorization not covered by the Grad School into Third-Party Funding

Travel Timeline



Spend Authorizations

- Spend Authorization Form must be completed 30-60 days prior to travel
- Fill out the Spend Authorization Form (Excel spreadsheet), found on the Grad School website under “Forms”
- It is the student’s responsibility to delegate expenses on the Spend Authorization not covered by the Grad School into Third-Party Funding
- Email the Form to eliston@umc.edu, along with:
 - Conference Brochure/Info
 - Abstract Acceptance & Submission receipt (if applicable)
 - Conference Registration receipt
 - Any other trip expenses you have already purchased (flights, etc.)

The screenshot shows an Excel spreadsheet titled "Workday Student Spend Authorization Form - WIP - Excel". The spreadsheet is a form with various fields for student information, conference details, and travel expenses. It includes sections for "NAME", "CONFERENCE NAME", "LOCATION", "DATES OF TRAVEL", "DESCRIPTION", "ANTICIPATED TOTAL AMOUNT", "DEPARTMENT", "GRANT NAME", "PRINCIPLE INVESTIGATOR", "EXPENSE ITEM", "TOTAL AMOUNT", "CASH ADVANCE REQUESTED", "PRIOR TO TRIP EXPENSE", and "THIRD-PARTY FUNDING". The spreadsheet also contains several yellow callout boxes with instructions and notes.

Callout Box 1 (Row 3-4): Please fill out your name, the name of the conference you are attending, your dates of travel, a short description of your travel, and the total anticipated cost of your travel here.

Callout Box 2 (Row 8-9): If your total charges are over \$1,500 and/or will be covered by a department/grant, please fill out the name of the department, grant, and Principle Investigator (grant owner) in the boxes if applicable.


Callout Box 3 (Row 14-15): Students must supply a cost comparison between a minimum of two (2) economy fares prior to booking a flight. The two quotes should not be from the same website. The student will be expected to purchase the cheapest flight fare possible.

Callout Box 4 (Row 18-19): In the following boxes, fill out in the appropriate travel item areas the total cost of the expense. "Cash Advance" = Travel Advance; Cash Advances are available 20 days prior to travel. "Third-Party Funding" are any costs covered by a department/grant/scholarship outside the Graduate School. "Prior to Trip Expenses" are any costs the traveller has already paid and must be submitted with a PDF of receipt showing proof of purchase -- these will be reimbursed ASAP.

Callout Box 5 (Row 21-22): The Graduate School will cover up to \$1,500 of travel expenses. It is the student's responsibility to delegate any outside expenses not covered by the Graduate School into Third-Party Funding or personal funding.

Callout Box 6 (Row 24-25): Please return this form via email to the Graduate Studies office with: confirmation of acceptance to present research at conference; conference schedule; receipts/estimates of airfare, hotel, tuition,

Spend Authorizations - Rules

- **DO NOT** delay in submitting your Spend Authorization to the Grad School office – Spend Authorizations should be submitted 30-60 days before travel
- **Airfare:** Students must supply cost comparison between 2 different airline economy fares before booking a flight; 2 quotes cannot be from the same website/airline.
 - Ex: A Delta flight from Expedia + American Airlines flight from Priceline = 

The same Delta flight from Delta.com + Expedia = 

A Quick Note on Meals & Food Cash Advances...

- **WARNING:** If you ask for a Cash Advance for your meals, travel will give you a lump sum based on the per diem rate of your travel location. **If you do not spend the entire sum of the cash advance for meals, you will owe whatever money that has not been spent back to Travel.**
- **Meals are reimbursed based on actual cost not to exceed the maximum daily reimbursement rate.** Meal charges exceeding max. daily rate will not be reimbursed.
- If you do not have an itemized receipt, you will not be reimbursed for that meal -- PLEASE ASK FOR & RETAIN ALL ITEMIZED RECEIPTS FOR FOOD. **TIP: You may take a photo of your receipts, that way you don't have to keep up with paper receipts!**
- **Meal Reimbursement Rates may be found on the Grad School website on the Forms page.**

Expense Reports – Itemized Receipts

- **Meals:** Students must supply an itemized receipt (showing items purchased) from every meal in order to be reimbursed. No alcohol charges will be reimbursed from receipts.



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R25

NAME [REDACTED] COST CENTER [REDACTED] TOTAL COST [REDACTED]

PROGRAM Pharmacology GRANT NAME [REDACTED]

Item	Cost	Third Party Funding?	Prior to Trip Expense?	Grad School Expense?	Cash Advance?	Grant Expense?	Total
Airfare	\$463			\$463.10			\$463.10
Abstract Fees							\$0.00
Baggage Fees	\$60			\$60.00			\$60.00
Conf. Fees							\$0.00
Hotel	\$1,081.41			\$1,081.41			\$1,081.41
Meals & Food	\$238.59			\$238.59			\$238.59
Mileage							\$0.00
Parking Fees							\$0.00
Taxi/Car Service							\$0.00
Train/Bus Serv	\$58.00			\$58.00			\$58.00
Third Party Funding (APSA)						(\$1,000.00)	(\$1,000.00)
Total							\$901.10
						SUBTOTAL	\$901.10
APPROVED:	The Graduate School will pay up to					CASH ADVANCE	\$2,040.51
	\$1,500 in eligible travel expenses.					TOTAL	-\$1,139.41

NOTES: PLEASE SEND ALL RECEIPTS IN A SEPARATE EMAIL

Here's an example of a correctly completed Expense Report form. Note the applied travel award, directly received by the student, in the bottom row.



← Total amount spent traveling

← Total amount received prior to travel

← Total amount due to Travel

Required Receipts

- Lodging – An itemized hotel bill showing the rate and proof of payment; ***IF YOU HAVE A ROOMMATE, PAY ONLY FOR YOUR HALF OF THE BILL*** Most hotels will allow you to do this at the check-in desk.
- Airfare, Bus or Train Tickets – Itemized receipts and itinerary are required and should include departure and destination cities with dates of travel, as well as proof of payment
- Registration or Conference Fees w/ proof of payment
- Abstract Fees w/proof of payment

Required Receipts

- Taxi Services w/proof of payment, date and destination
- Parking fees
- Baggage fees
- Meals and Food – ITEMIZED RECEIPTS
- Mileage (if taking ground transportation) with a Google Map routing the trip w/ total miles

FAQ's

- Do I have to have a roommate?
 - Ideally, yes. If another same-sex/gender SGSHS trainee is also attending your conference, you should room with them for cost-effectiveness. Please be sure to only pay for your half of the room fees.
- Can I use Grad School funding for international travel?
 - No. The Graduate School only pays for travel within the continental US (Hawaii, Alaska and Canada are considered to be international travel).
- Can I book a room via AirBnb or non-conference hotel?
 - Yes, but try to use the conference hotel first. If the conference hotel is unavailable, complete a Travel Waiver Form prior to travel in order to get permission from Travel to use an AirBnb. You must supply an invoice with the breakdown of costs from your AirBnb booking.

FAQ's

- Can I rent a car while traveling?
 - ONLY if you need to visit several places for conference purposes, OR if transportation between the airport and hotel/meeting is needed and there are no taxis available. If you need to rent a car, please contact the Grad School prior to travel to fill out a form. Renting a car for sightseeing or personal use is not eligible for reimbursement.
- If I owe Travel money back, when is that due?
 - You have 15 days after travel (i.e., the end date of your travel as elected on the Spend Authorization form) to pay back Travel the money owed.
- What if I receive a travel award?
 - If the travel award is given directly to the student, the student will apply the award money to their total cost of travel and will send the Grad School a copy of the award notification & proof of payment to the student.

If You are Struggling...

- Contact Us!

- Emma Liston – eliston@umc.edu – 601-984-1195
- Shanna Moulds – smoulds@umc.edu – 601-984-1632
- Jessie Bowman – jdbowman@umc.edu – 601-984-1199

- Travel Policies & Procedures Handbook:

<https://documents.umc.edu/getattachment.ashx?AttachId=1f5249dd-3eb6-4154-aa22-3c6d63566a9c>