How to Travel
School of Graduate Studies in the Health Sciences
2021-2022
Virtual Conferences

• As of 1/1/2021, Travel/Accounting is only reimbursing students for Virtual Conference attendance **only**. In-person conference attendance will not be eligible for financial coverage until further notice.

• **However, if a student wishes to travel to an in-person conference, they may do so but will not be eligible for reimbursement by UMMC.**

• The Cash Advance system has also been suspended by Travel Accounting. **The student must pay in full for all conference costs before the Graduate School can submit for reimbursement on their behalf.**
Virtual Conferences

• The Virtual Conference form can be found on the Graduate School website under “Forms” – fill out the form, have it signed by your program director, and email the completed form to the Graduate School with:
  • Applicable receipts
  • Brochures/Conference information
  • Registration confirmations
  • Abstract acceptances
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** – 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
Professional Skills Travel Program

- The Graduate School will pay up to $1,500 in student travel expenses for workshops, training courses, etc. after passing the Qualifying Exam, once per year.

- For this type of travel, the Professional Skills Travel Request Form must be filled out, turned in to the Grad School, and approved by Dr. Granger before the student begins planning their travel.

- This form can be found here: https://www.umc.edu/graduateschool/files/phd-professional-skills-travel-program-request-form.pdf
Travel Timeline

Fill out & email in Spend Authorization Spreadsheet 30-60 days before travel and have received your abstract acceptance

Grad School will enter Spend Auth. into Workday. Once SA has been approved by Travel, we will submit PTE reimbursements and any Cash Advances requested 30-60 days before travel

Student will receive PTE reimbursement check ASAP; Cash Advance check should arrive 20 days prior to travel date, provided travel has been entered in a timely manner

Three Outcomes:
- Accounting owes student $
- Student owes Accounting $
  back
- Costs balance out, everyone is happy!

The Grad School will enter the student’s Expense Report into Workday 15-30 days after travel; the system will check the Expense Report against the student’s original Spend Authorization

After travelling, student has 15 days to submit the Expense Report spreadsheet to the Grad School along with all receipts – does not include any prior reimbursements
Spend Authorizations (In-Person Travel Only)

• 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.)
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 (In-Person Travel Only)

• Fill out the Expense Report (Excel spreadsheet) form, also found on the Grad School website under “Forms”

• The form will help you calculate the total cost of your expenditures vs. your cash advances/PTE reimbursements

• Email the completed Expense Report form with all your receipts to eliston@umc.edu
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.
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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
<th>Third Party Funding</th>
<th>Prior to Trip Expense</th>
<th>Grad School Expense</th>
<th>Cash Advance</th>
<th>Grant Expense</th>
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</table>

**NOTES:**
- PLEASE SEND ALL RECEIPTS IN A SEPARATE EMAIL

**APPROVED:** The Graduate School will pay up to $1,500 in eligible travel expenses.
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

In-Person Travel

• 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 to 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!
  • 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