Business PhD Student Travel & Expense Guide

Golden Rule: Get approval **BEFORE** you book, leave, or pay for anything. Do **NOT** pay for flights or expenses out-of-pocket in advance without consultation with the PhD Program Coordinator.

Step 1: Calculate Expenses & Gather Funding

- Estimate your total costs (registration, flights, accommodation, ground transit, per diem).
- Identify funding sources (TEA account, supervisor funds, GSA/GPS Travel Awards, or personal funds).
- **Apply for grants!** If awarded funding, forward award letter to busphd@ualberta.ca and specify which trip it applies to.

Step 2: Request Supervisor Approval

- Email busphd@ualberta.ca and **cc your supervisor**.
- Copy and paste the email template below (p.3), fill in your details, and submit.
- Your supervisor must reply approving the expenses and providing a speed code before proceeding.

Step 3: Set Up Concur Profile

- Ensure your profile is fully set up on **Concur** prior to requesting flights.
- Fill in all personal details, but **do not book flights directly in Concur**.

Step 4: Book Flights (Via Maritime Travel)

- Email **Maritime Travel** at ualberta@maritimetravel.ca (or call 780-492-7000) and **cc** busphd@ualberta.ca using your @ualberta.ca email.
- State that you are a **Business PhD student** and include:
    1. Full legal name (matching passport)
    2. Citizenship and passport number
    3. Date of birth (spell out the month)
    4. Gender
    5. Mobile phone number
    6. Seat preference & frequent flyer number

7. Travel dates & destinations (Standard Fares preferred; suggest flights if pre-searched)
8. PhD Contact Carmen or Debbie at busphd@ualberta.ca (780-492-5816) for TAP #, speed code, and faculty name.

- Select the most reasonable quote from Maritime. The PhD Coordinator will finalize the booking with a TAP number.
- *(Note: Personal travel can be added if comparative quotes show no extra cost to UA-related travel)*.

Step 5: Arrange Accommodations & Other Expenses

- **Major Canadian Cities:** Check the HAP hotels list for UA room rates first. Send confirmation to the PhD office to issue a HAP# for direct payment.
- **Other Accommodations & Registrations:** Work with the PhD Program Coordinator to process payments via the PhD PCard or direct invoice. Your personal credit card can be used and invoice/receipt submitted for reimbursement after you return.

Step 6: Per Diem & Allowance Guidelines

- Per diem do not require receipts, though receipts can be kept as supporting. Meals provided by the conference or during flight travel cannot be claimed.
- **Canada or USA:** Full day rate $70 CAD/USD per day (Breakfast $15, Lunch $15, Dinner $30, Incidentals $10).
- **International Travel (including Hawaii):** Full day rate $95 CAD per day (Breakfast $20, Lunch $20, Dinner $45, Incidentals $10).
- Please note: the PhD Office will calculate your eligible per diem allowance, you only need to indicate if you would like these amounts included in your claim. Please use the maximum amount when budgeting for your estimate.

Step 7: Submit Claim Upon Return

- Complete the Google Business PhD Travel Claim Form found in the PhD Forms Cabinet or requested via busphd@ualberta.ca.
- Submit all applicable documentation requested in the form for reimbursement.
- Claims must be submitted within **21 days** of return or purchase date and within the fiscal year (April 1 – March 31).

Email Template for Travel Funding Request

Copy and paste this template into an email to busphd@ualberta.ca with your supervisor cc'd. Alternatively, you may use the excel spreadsheet to calculate your anticipated expenses and attach it.

Subject: Travel Approval & Funding Request – [Your Name] – [Conference Name]

To: busphd@ualberta.ca

CC: [Your Supervisor's Email]

Dear PhD Office,

I am requesting approval for upcoming travel and expense funding. Below are the details of my request:

- **Name of conference/event:** [Insert Name]
- **Dates of conference/event:** [Insert Dates]
- **Presenter/Title of Paper:** [Insert Title or "N/A - Attending"]
- **Membership fee:** $[Amount]
- **Registration fee:** $[Amount]
- **Accommodation:** $[Amount]
- **Flights/Travel (car, bus, etc.):** $[Amount]
- **Ground Transportation (e.g., Uber, transit):** $[Amount]
- **Per Diem Request:** [Yes/No - Max $70/day domestic/USA, $95/day international]
- **Total Estimated Request:** $[Total Amount]

I have cc'd my supervisor for approval and speed code confirmation.

Thank you,

[Your Name]