

Business PhD Travel Procedures

All **travel** by staff, students and faculty members must be booked through the University of Alberta-appointed travel agent: **Maritime Travel**.

Business PhD Students must follow these steps when travelling on University business, using UA funds (i.e. conferences, research trips, job market covered by PDA/TEA or supervisor's funding). (If you are travelling for personal reasons on your own funds you do not need to follow these procedures, however, note '3.i' below).

1. Obtain written approval from your supervisor to use your PDA/TEA funds, or to use their research funds to support your travel. If supervisor funds are being used, ask for the speed code. **Include an estimate of expenses** (find [Request to Use Travel and Expense Account Funds \(Excel\)](#) on [Forms & Policy](#) page). Forward the travel approval email and estimate to busphd@ualberta.ca. Estimates help determine if you have sufficient PDA/TEA funds to cover all travel costs, or if you need to find additional funding from a supervisor, or need to apply for a travel grant. The PhD Office must have this information BEFORE you book your travel or incur any expenses.
2. Create a [Concur travel profile](#) to record your personal travel information. Do NOT enter flight requests here; email requests to Maritime Travel. Refer to your Concur profile on future requests.
3. Email ualberta@maritimetravel.ca and copy busphd@ualberta.ca to request flights. **You must use your @ualberta email address.** (Maritime agents may not be readily available if emailed individually). Email the following information:
 - a. Specify your legal **First name (middle name) and Last name** as they appear on your **passport**;
 - b. Your citizenship and passport number;
 - c. Your date of birth (spell the month);
 - d. Gender
 - e. Your mobile phone number for travel notifications;
 - f. The dates you wish to travel, destination, and any other details about your trip required to book flights.
If you searched for flights that you want, let them know what they are. Standard Fare tickets are usually booked to protect the university with cancellation/refund/insurance coverage and provide valued services not offered with low (basic) fares that you might have found. Options you want may not be available but Maritime agents will work with you for the best arrangements possible. Agency fee \$33.08/ticket is additional.
 - g. Aisle or window seat preference, and frequent flyer number if applicable.
 - h. Tell Maritime you are a Business PhD student and have notified the PhD office about the booking and to contact Helen or Debbie at the PhD office to pay the invoice. We advise them of TAP#, speed code and maximum ticket cost. Our contact info is busphd@ualberta.ca or 780-492-5816.
Students CANNOT pay for their own flights and expect to be reimbursed.
 - i. Flights must be based on conference and/or research activities/dates. If you wish to add personal days you must request two quotes: one for specific conference travel – this is the cost that is approved; the second quote based on personal travel – must be less than conference travel quote, or the difference must be paid by the student (either in reduced reimbursement or paid back to the PhD Office by cash or cheque). If adding family members, work directly with Maritime and separate the billing.

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- j. When you have your final flight selections and costs, confirm that those are the ones to be booked. Helen will check for approvals and the original estimate; then will advise Maritime of the TAP number and speed code for billing.
4. Remember: Memberships and conference registrations must be paid by PhD office card. Do not pay any expenses with your own card that can be paid (before you travel) by the PhD office.
5. FOR STUDENTS REQUIRING TRAVEL VISAS:
 - a. Visa fees/expenses are only reimbursable if visa is approved and travel to intended conference or research work takes place. Fees/expenses must be submitted within 90 days or with the conference travel claim.
 - b. If a visa appointment is set and approval is received BEFORE the conference, visa fees should be paid by PhD Office credit card. Student may only pay by personal card if visa appointments are difficult to book during PhD Office hours with the PhD credit card info.
 - c. If the only available visa appointment is AFTER the intended conference date, with student planning to request expedited approval, students must pay fees/expenses on their own. If visa is processed and travel to the intended conference is successful, fees/expenses can be submitted for reimbursement with the conference travel claim. PhD Office is not obligated to cover visa fees/expenses for missed conferences.
6. Hotels:
 - a. If travelling to a major Canadian city, you must check the room rates of [approved HAP hotels](#) for reduced costs available to UA. Contact HAP hotel for rate availability and determine if there are savings advantage. Conference-specific hotels may cost more but MAY be more economical, (e.g. saving taxi/train fares and time – do the math!). You should make a reservation and inform the hotel that payment will be by HAP number. Then submit to busphd@ualberta.ca the hotel name, expected rates, your check in/check out dates and the reservation number if booked (include any special requests that must be included in the booking such as late check in). Helen will check for approvals, estimate and speed code, and submit a HAP form.
HAP only covers room charges. Students will be asked upon check in for a credit card to cover incidentals (like meals, wifi). You may submit eligible expenses for reimbursement in a travel claim upon your return.
Please be sure you get a **final detailed hotel invoice** showing all the charges and the HAP number/payment.
 - b. Hotel rooms (non-HAP) may be reserved on a personal card; and upon check-out, you pay on a personal card. Submit a travel claim for reimbursement.
 - c. If the hotel allows credit card payment pre-arrangements, check with Helen about submitting the PhD Office credit card information to the hotel for direct payment (so your personal card need not carry this expense).
7. Within 21 days of returning from your trip you must submit all related conference/travel invoices and receipts to the PhD office for a reimbursement claim. Only one claim for a trip can be submitted so it must be complete with all associated invoices/receipts.
8. You must complete the Travel Checklist to ensure all items for your claim are detailed and identified. Electronic/scanned receipts are accepted; do not hand in paper receipts.
9. If claiming meals, per diems are preferred (can use your receipts to match claims for B/L/D; detailed receipts are required if you hosted a meal). If meals were supplied by the conference, per diems cannot be claimed. You must submit a conference agenda or program so supplied meal listings can be checked.
10. See the Travel Claim Info sheet for additional, detailed information on submitting claims.