

# Graduate Student Travel

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The Ins and Outs of Traveling with UNT Money

# In the Beginning...

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How to Request Funds from the History Department

# Eligibility

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- To be eligible to request funding from the History Department, you must:
  - Be in good academic standing
  - Have a degree plan on file with the department AND Toulouse Graduate School
  - Attend 3 or more TGS Professional Development Graduate Workshops *in the academic year you are applying*
  - Required forms & info can be found here: <https://class.unt.edu/history/department-information/travel.html>

*\*Students may apply for Departmental travel support for ONE trip per academic year\**

# Required Documentation

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- The following MUST be included with your application to be considered for funding:
  - Request for Travel Funds (RTF) form
  - Short statement of recommendation from student's major professor indicating their support (can be 2 or 3 sentences)
  - Curriculum Vitae
  - Short justification for travel (less than 300 words)\*

**\*see next slide for more details\***

Required Documentation continued...

# Justification for Travel requirements

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## Research Travel

- The research that they intend to conduct; i.e. the specific archival facilities and manuscript collections they plan to visit, and/or their specific field sites and locations, and or other relevant details
- How this research travel will contribute towards the completions of their thesis, dissertation, seminar paper, or other research project.

## Conference Travel

- Submit a short explanation of how students will participate in the conference, seminar, workshop, or professional meeting. In situations where there is already a program available that lists this information, a copy of the relevant pages is acceptable in lieu of a written explanation.

# Award Periods

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- History Department Travel Grants are broken down into 3 Award periods:
  - Fall (Travel dates from October 1<sup>st</sup>- January 31<sup>st</sup>)
    - Deadline for submission: September 15th
  - Spring (Travel dates from February 1<sup>st</sup>- May 31<sup>st</sup>)
    - Deadline for submission: January 15th
  - Summer (Travel dates from June 1<sup>st</sup>- August 15<sup>th</sup>)
    - Deadline for submission: May 15<sup>th</sup>

All applications received  
will be submitted the day  
after the deadline has  
passed

\*No funds available for travel from August 15<sup>th</sup>- September 30<sup>th</sup>\*

# Appling for the History Department Travel Grant

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- To apply for a History Travel Grant, go to:  
<https://class.unt.edu/history/department-information/travel.html> for application and instructions for that Award Period.

# Show Me the Money!

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Additional Funding Opportunities

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# CLASS Travel Grants

# CLASS Travel Grants

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## General Info

- What is it for: Support for conducting or presenting research
- Up to \$500
- Students may apply for CLASS travel support for ONE trip per academic year

## Preference given to students who:

- Have a 3.5 overall GPA (or above)
- Have completed 18 hours or more at UNT
- Are presenting co-authored papers/presentations/posters

# Required Documents

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- Clearly defined Statement of Purpose, including benefits for the student's progress towards their degree (max 1 page)
- Curriculum Vitae
- Current Unofficial Transcript
- Acceptance letter for paper/poster presentation and abstract (if applicable)
- If applying to conduct research, must include statement from major professor justifying need for funding

# Award Periods

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- CLASS Travel Grants are broken down into 3 Award periods:
  - Fall (September 1<sup>st</sup>- December 31<sup>st</sup>)
  - Spring (January 1<sup>st</sup>- May 31<sup>st</sup>)
  - Summer (June 1<sup>st</sup>- August 31<sup>st</sup>)
- Deadlines vary, but will be sent out via email at the beginning of each award period.

# Applying for a CLASS Travel Grant

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- To apply for a CLASS Travel Grant, go to:  
<https://class.unt.edu/advising/graduate-student-travel-support-grants> for application and instructions for that Award Period.

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# Toulouse Travel Grants

# General Information

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## What is it for?

- To support the cost of conference registration to professional meetings that are relative to their degree
- Students who are merely attending a meeting without any active participation are ineligible for travel grant funding
- Must have a \$100-\$500 match already secured from the applicant's department, college, or another appropriate source. These funds are matched on a 1:1 basis. Eligible graduate students may apply for a maximum of \$500 with matching funds (for a maximum total of \$1,000).
- Students may apply for TGS travel support for ONE trip per academic year

# Eligibility

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- Must be in good academic standing
- Must be presenting research or creative activity which they have authored or co-authored
  - Must be peer-reviewed and accepted for presentation
- Must have an approved degree plan on file in the Graduate School. You will be asked to upload a signed and departmentally approved copy of your degree plan to your application. Contact [HistoryGradProgram@unt.edu](mailto:HistoryGradProgram@unt.edu) if you need a copy.
- Must attend 3 [TGS Professional Development Graduate Workshops](#) in the current academic year

- **Things to Note:**
  - Receipts must be turned into department within 2 weeks of scheduled end of conference
  - ALL TGS requirements must be completed by end of award application period to be considered
  - Unfunded trips will not roll to next award period.

# Required Documentation

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- [Faculty Evaluation for Travel Grant Applicants](#): Give this to Cairan Bergstrom. He will obtain the appropriate signatures and return it to the student. This form must be completed with the appropriate signatures, match information, and rating, and attached to the student's application.
- A current copy of the UNT [Travel Budget Authorization \(TBA\)](#) form. This form should be completed by the department authorizing your matching funds and must be attached to your application. \*matching funds must have already been awarded\*
  - If matching funds are from CLASS Travel Grant, take to Toni Penton in GAB 220 to fill out.
  - If matching funds are from History Department, take to Cairan Bergstrom in WH 227.
  - TBA must be signed by the student, a faculty member, and the financial officer or individual who is a financial decision-maker (Toni or Miranda).
- Conference Acceptance paperwork
- Workshop requirement documentation

# Award Periods

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- Travel grant applications can be submitted at any point throughout the academic year.
- The grants are awarded on a rolling basis with three evaluation periods throughout the semester.
- We notify students of their acceptance or denial 3-4 weeks after the evaluation deadline.

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| <p><b>Evaluation Period #1</b><br/><b>Fall Awards</b><br/>For travel occurring after<br/>September 1 and before August 31</p> <p><i>Application opens: August 15<br/>Deadline to apply: October 31<br/>Announced by November 30</i></p> | <p><b>Evaluation Period #2</b><br/><b>Spring Awards</b><br/>For travel occurring after<br/>September 1 and before August 31</p> <p><i>Application opens: December 20<br/>Deadline to apply: February 28<br/>Announced by March 29</i></p> | <p><b>Evaluation Period #3</b><br/><b>Summer Awards</b><br/>For travel occurring after<br/>September 1 and before August 31</p> <p><i>Application opens: April 15<br/>Deadline to apply: May 31<br/>Announced by June 28</i></p> |
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# Applying for TGS Travel Grant

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- To apply for a TGS Travel Grant, go to: <https://tgs.unt.edu/new-current-students/graduate-student-travel-award> for instructions and application.

# Important Notes:

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- Students are responsible for following instructions and submitting all aspects of applications in a timely manner (the History Department Staff and Faculty will not directly submit any documentation on student's behalf)
- If student is planning on **ANY** travel, submit RTF form to Cairan Bergstrom as soon as you know about the trip.
  - ALL travel requests MUST be submitted no less than 2 weeks before trip start date
  - Do **NOT** purchase anything for the trip before the RTF has been submitted, and Cairan informs you that it has been approved.
    - Anything purchased prior to the trip being approved in the UNT System is subject to not be reimbursed.
  - If your travel is international you must send the international travel registration confirmation you receive from Emergency Management to Cairan Bergstrom, so he can add it to your travel request. Please note all international travel must be registered at least 3 weeks before you leave on your trip.

# Traveler Must-Haves

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What you need to know before traveling

# Things to know/have before you travel

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## Texas Travel

- If you are traveling within Texas, you will need to provide the hotel with UNT's [Tax Exemption Form](#)

## International Travel

- Before traveling internationally, your trip must be reported to AND approved by Risk Management. You can find the form at: [https://riskmanagement.unt.edu/emergency/international\\_travel.html](https://riskmanagement.unt.edu/emergency/international_travel.html)
- All international travel must be registered at least 3 weeks before you leave on your trip
- You will need to provide the approval email with your travel grant applications

# Acceptable Receipts

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- Hotel Receipt Requirements:
  - The name and address of the commercial lodging establishment,
  - The name of the employee,
  - The single room rate,
  - A daily itemization of the lodging charges; and
  - Proof of payment.
- Airfare
- Taxi/Lyft/Uber/Train
- Registration
- Mileage (if applicable)
- \*All receipts must be itemized and show proof of payment
- \*All receipts must be turned into Cairan Bergstrom no later than 2 weeks after conclusion of trip

\*(Air BnBs are not preferred, but can be approved with all requirements met)\*

# Meals

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- Submit all meal receipts upon your return from travel.
  - All receipts must be itemized, dated, and show that they were paid by a card, cash, or otherwise
- Meals will only be paid for the single traveler with an approved travel request, unless there is a legitimate business reason for having a business meal with another person, involving them doing business with UNT.
  - Meals provided to a spouse, family member, or friend of a UNTS student will not be permitted
- Any business meal receipt must have a [Meal Reimbursement Request](#) filled out and submitted.
- You can find this form on the History site under Forms>Miscellaneous Forms and Documents

- Reminders:
  - Tips/Gratuities for meals are allowed up to 20%

# How to submit receipts

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- All receipts should be submitted digitally, so please scan them into a PDF document, or otherwise, and email them to Cairan at [HistoryGradProgram@unt.edu](mailto:HistoryGradProgram@unt.edu)
- Please make sure that all receipts have a clear date, location, and business purpose (breakfast, lunch, dinner, parking, hotel, flight, etc.)
  - For Lyft/Uber, etc. please indicate where you were going to/from and/or what the travel was for
  - For parking please indicate what it was for – at hotel, your research site, etc.
- On meal receipts, please indicate which items ordered are yours, by highlighting or otherwise, as I only reimburse your personal food and drink
- Please take special care when submitting international receipts to note dates, locations (city, country), what the receipt is for, etc. so I can interpret what you did on your trip. Anything I cannot understand/read will not be reimbursed.
- It is best practice not to ask for any reimbursement of alcoholic beverages. Depending on the type of funds awarded, alcoholic beverage purchases may not be reimbursed, as many funds do not allow the reimbursement of alcohol.

# Lost Receipts Process

- If you have lost a receipt, or were not issued an itemized receipt, you can fill out a [lost receipt affidavit](#) to submit with your other receipts upon return from your trip.
- Each lost receipt requires its own lost receipt affidavit.
- The lost receipt affidavit can be found under Forms>Miscellaneous Forms and Documents

**UNT SYSTEM**

**Receipt Affidavit**

Complete this form when requesting an exception to the documentation rules for a given purchase.

|  |                  |  |
|--|------------------|--|
| Employee Name:                         | Department:      | Today's Date:                          |
| Dept/Proj/Grant ID:                    | Vendor name:     |  |
| If applicable, Last Four of the PCard: |                  | Vendor Address: (City, State, Zipcode) |
| Date of Purchase:                      | Purchase Amount: | Contact Number:                        |

Description of Items Purchased should be as detailed as possible (For Meals-List of Attendees, Food listing, etc.):

No alcohol was purchased for any expense on a state, grant or athletic fund.

Explanation of Missing Receipt:

Lost Receipt  
 Vendor could not provide itemized receipt  
 Other:

I attest that the above facts are true and accurate.

Attested by: \_\_\_\_\_ Date: \_\_\_\_\_

1112 Dallas Dr. Ste. 4000 | Denton, Texas 76205 USA | TEL: 940.369.5500 | 1.855.868.4357 | TTY 940.369.8652 | <http://bsc.untsystem.edu>

# Non-Reimbursable Travel Expenses

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- 1. Personal expenses –i.e. toiletries, toothpaste, shampoo
- 2. Laundry and dry cleaning
- 3. Use of Hotel fitness equipment
- 4. Pillow for air travel/flight
- 5. Kennel expenses for pets
- 6. Excess baggage charges (personal belongings)
- 7. Airline Club dues
- 8. Hotel video rentals (personal entertainment)
- 9. Travel insurance-coverage for individual's "health" while traveling
- 10. Child Care

## Please Note:

- All non-reimbursable travel expenses submitted will be considered a personal expense and will not be reimbursed
- **Business Purpose**-A *state agency* may reimburse a *travel expense* only if the purpose of the travel clearly involves official state business and is consistent with the agency's legal authority.

# Fun with Coupa!

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Submitting Travel Authorization Requests and Reimbursements via  
Coupa

# Approving Concur Reports

When a trip is requested (RTF form), Miranda Leddy will enter the trip into the Coupa System

Once the trip is approved, you should receive an email notification from Coupa

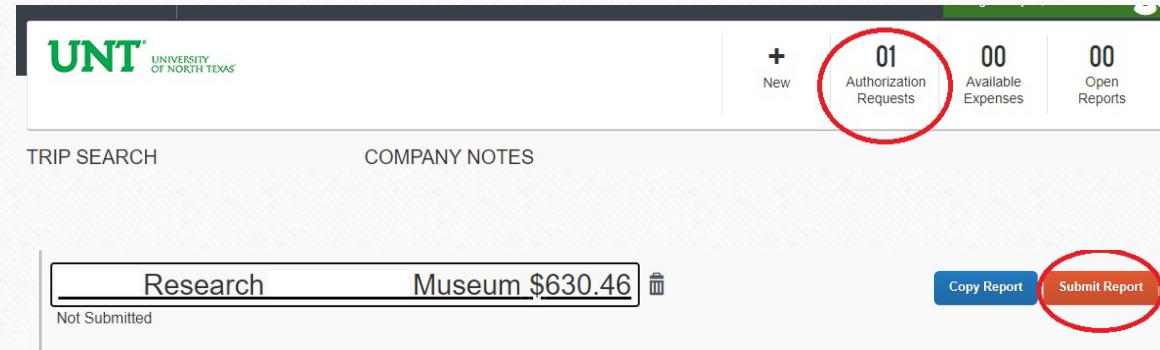
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This report can be reached at [myhr.unt.edu](http://myhr.unt.edu)-> Employee Resources-> Coupa Expense

This will begin the process for approval through the UNT System. Once your trip is approved you can proceed with purchasing airfare, etc... for your trip.

Upon returning from your trip, submit your receipts to Miranda Leddy, who will enter them into the Expense Report for reimbursement.

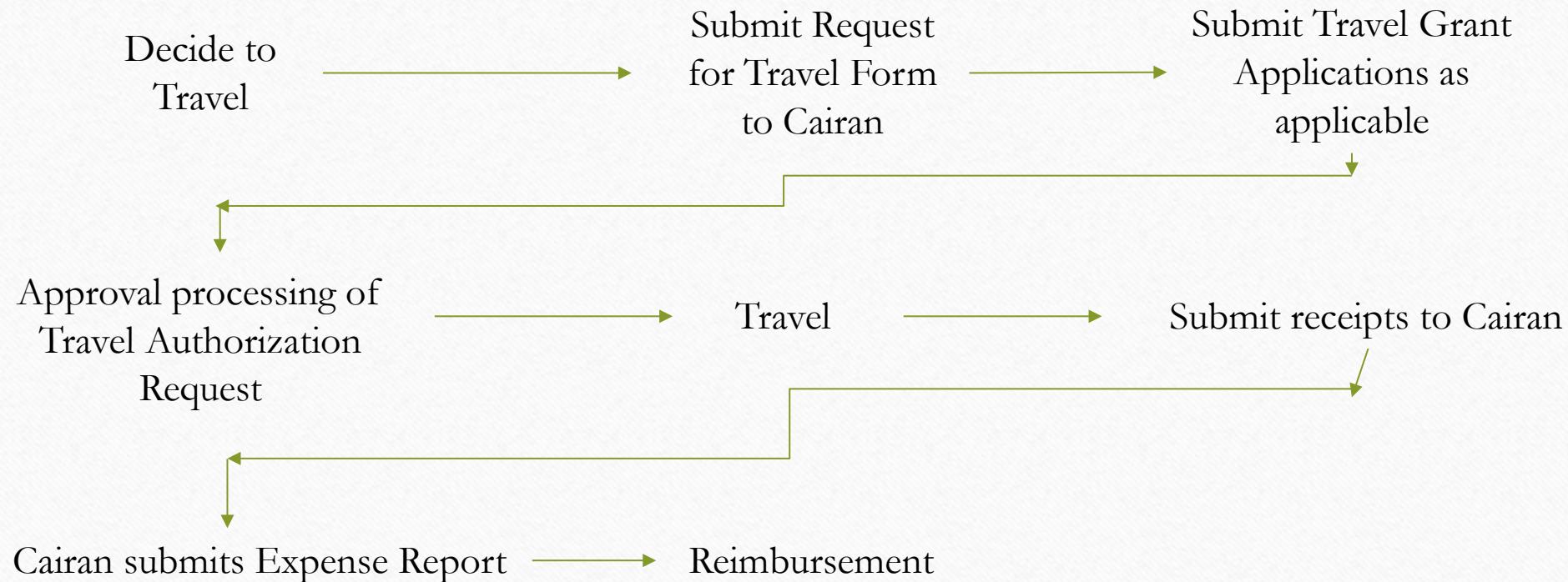
Once the Reimbursement is approved, you should receive an email notification and payment issued within a few days after approval



The screenshot shows the Coupa system interface. At the top, the UNT logo is displayed. To the right, there are four status indicators: '+ New' (01 Authorization Requests), '00 Available Expenses', and '00 Open Reports'. Below the logo, there are two buttons: 'TRIP SEARCH' and 'COMPANY NOTES'. The main content area shows a report for 'Research' and 'Museum' expenses, totaling '\$630.46'. The report status is 'Not Submitted'. At the bottom right, there are two buttons: 'Copy Report' and 'Submit Report', with 'Submit Report' being circled in red.

**Do NOT *create* any reports in Coupa.  
This could invalidate your reimbursement.**

# Travel Cycle



# Travel Links

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- [History Travel Forms](#)
- [CLASS Travel Grants](#)
- [Toulouse Travel Grants](#)
- Contact: Cairan Bergstrom

WH 227

[HistoryGradProgram@unt.edu](mailto:HistoryGradProgram@unt.edu)

940-565-2489