

EDL & Miami University travel and research support for Graduate Students, 2009-10

Graduate School Funding for Masters and Doctoral Students in the Department of Educational Leadership

See information about the following funds at:

http://www.miami.muohio.edu/documents_and_policies/graduatebulletin09/index.html

The Graduate Students' Achievement Fund. This fund is used to recognize significant achievement in any research or creative activity that has been recognized by some external (to the home department) organization. The normal award is \$300. Application forms are available in the Graduate School, 102 Roudebush Hall. Deadlines are early November and early April. Check with the Graduate School for more details. 102 Roudebush Hall. 513-529-3734. gradschool@muohio.edu

Thesis and Dissertation Research Support. This fund covers unusual expenses associated with a student's research for a thesis or doctoral dissertation. There is no application form, but you must briefly describe your research project and explain why these expenses are necessary and offer a tentative budget. You also must have the endorsement of your adviser or department chair. Awards will not exceed \$300 for master's students or \$600 for doctoral students. Requests for this special funding must be made by early November and early April. Check with the Graduate School for more details. 102 Roudebush Hall. 513-529-3734. gradschool@muohio.edu

Graduate Student Association Travel Assistance Fund. The G.S.A. Travel Assistance Fund is designed to reimburse graduate students for travel to meetings, conventions, conferences, and workshops sponsored by professional organizations. The fund is administered by G.S.A. Deadlines for each round of funding are listed on the application. There is a round of funding during each semester (fall, spring and summer). Application forms and guidelines are available in the Graduate School Office, but questions about the fund or the process should be directed to the G.S.A. officers (<http://www.orgs.muohio.edu/gsa/>).

Grants for Graduate Award Holders to Improve Teaching CELT (Center for the Enhancement of Learning & Teaching) awards grants of up to \$300 to individuals, faculty supervisors, coordinators of departmental teaching seminars, and departments to develop individual teaching skills and to supplement departmental support for TA seminars on teaching. These grants can fund modest projects by graduate students designed to increase their teaching effectiveness and their students' learning. For more information and an application form see the CELT website <http://www.units.muohio.edu/celt/>

EDL Funding for Masters and Doctoral Students

Graduate students in EDL have access to a small pot of professional development funds in the Department.

You can use this to cover any expenses for academic related travel to conferences at which you are presenting for the academic year and/or for expenses related to your academic research (travel, books, software, etc.)

Full time doctoral students can receive **\$400**.

Part-time doctoral students and full and part time masters students can receive **\$200**.

How to draw on EDL funding—a 3-step process

STEP #1 ***VERY IMPORTANT!!** See the “Travel Policies and Procedures” guideline at the end of this document to see what can be reimbursed. (for example hotel expenses within 45 miles will not be reimbursed; plus see special guidelines for rental cars, excess baggage, hotels, etc) and how to request reimbursement.*

STEP #2. Submit “Request for EDL Funding Form” (see next page) to Kate Rousmaniere (rousma@muohio.edu)

STEP #3. Expenses and reimbursements

There are two methods to pay for travel expenses with Departmental funding. **Note:** *The Department can only buy airplane tickets in advance. All other expenses need to be done through reimbursements.*

Method #A

Buy your ticket, attend your conference, and after you return home bring all of your receipts (for travel, food, hotel and other eligible expenses) *in the original*, back to EDL with the university travel form completely filled out. Give the material to **LINDA ALLEN** in the Office of Family Studies and Social Work, McGuffey Hall 101A. 529-2323. Leave 3-5 weeks for the University to send you the reimbursement check. You can access the university travel form at:

http://www.units.muohio.edu/controller/prod/accounts_payable/

Method #B

To buy airplane tickets: we have a relationship with two travel agencies in town with whom you can order a ticket and EDL will pay the agent for the cost. Call Travel 4 U (523-3564) and reserve your flight. Tell them that Cindie Ulreich will call with the credit card. Give the details of the reservation to Cindie in the main EDL office (529-6825 or rosscm@muohio.edu). (It's too complicated for us to let people go through travel web sites or airlines and then apply it to our credit card. The travel agents can usually get just as low a fare as the web sites offer.)

Request for EDL Funding

In order to request EDL funding, complete the following and send it electronically to Kate Rousmaniere, rousma@muohio.edu if you are requesting funding for a conference.

Your name:

Degree program:

Today's date:

Conference or research activity for which you are requesting support.

Include here a description of your involvement (e.g. My paper, entitled "Great Research Topic," was accepted for the University Council of Educational Administration annual conference in Anaheim California, November 19-22, 2009. I am requesting support for the flight or hotel so I can attend the conference. OR I am requesting funding so I can drive to Cleveland Ohio to observe a classroom site. This is a central part of my dissertation topic, and my advisor has approved this work).

Amount of money you are requesting.

Travel Policies and Procedures

Travelers must provide a report substantiating the amount, time, use, and business purpose. This report can be found at the following link:

http://www.units.muohio.edu/controller/prod/accounts_payable/?showme=docindex.htm

Original receipts must be attached to the report or explanation of why originals could not be used.

Proof of payment is required. This may include a copy of your credit card statement showing the expense (other information may be marked out...only your name, the bank's name, the last four digits of the card number used, and the relative charges are needed). If a charge statement cannot be assessed then an actual copy of your credit card with your name and the last four digits of the credit card # can be attached. If a check was used then a copy of the cancelled check should be attached.

If you incur any expenses that you are not asking reimbursement for such as hotel, car rental, conference fees, air flight, etc. or if you stay with friends you will need to include that explanation on your travel form. Accounts payable will question these things even though you are not requesting reimbursement. The more information included the less likely it will be returned. Documented explanations for unusual circumstances encountered by the traveler are always helpful in substantiating the expense.

To insure compliance with the policy and procedure guidelines, travel expense reports should be turned in within a reasonable amount of time after travel is completed. This will help the traveler receive the accurate per diem and mileage rates pertaining to the time frame of the travel.

It is strongly recommended that before any travel takes place the traveler should carefully study the policy and procedure guidelines. This will keep the traveler up to date with new changes in per diem and mileage, as well as any other changes to the policy.

http://www.units.muohio.edu/controller/prod/accounts_payable/handbook/HANDBOOK.HTM#TRAVEL1

If a spouse has no significant role in the proceedings attendance does not constitute a bona fide business purpose. Such expenses are taxable to the employee and therefore may not be reimbursed under this policy.

If travel is not more than forty-five or more miles a way hotel expenses are not reimbursable. If special circumstances dictate the stay and explanation should be attached to the travel form.

Most personal expenses incurred while traveling will not be reimbursed. Hotel-related expenses not reimbursed include:

- In-room movies/video rentals

- In-room alcoholic beverages or snack bar items
- Babysitting
- Recreational activities
- **Other personal items**

Travelers may rent a car to/at their destination when:

Driving is necessary to transport large or bulky supplies and/or materials; and, it is less expensive than other transportation modes such as taxis, airport limousines, and airport shuttles.

Travelers are expected to request the least expensive rental car available. Upgrades are not allowable unless an explanation of legitimate need is provided.

Rental Car Reservations

Various car rental companies offer discounts to the University. To take advantage of the discount, individuals may call the Purchasing Office, 9-9200, for a corporate account number and an updated list of current car rental companies. Current rental car companies which usually offer a discount include:

- Avis
- Budget
- Hertz
- National

When traveling on University business within the U.S., optional car insurance should be declined. Collision and other physical damage coverage for rental cars is included in the Miami University fleet insurance policy, and automatically covers cars rented for use while traveling on official University business, whether billed directly to the University or billed to the employee subject to reimbursement authorization. Purchase of additional damage waiver insurance for official travel within the U.S. will not be reimbursed. For travel outside the U.S., the optional damage insurance should be accepted and will be reimbursed for official travel.

The University's insurance will not cover personal use of rental automobiles. If a portion of the rental is for personal use, travelers should look to their personal automobile insurance or purchase optional damage insurance at personal expense to insure physical damage coverage.

Authorized Rental Car Drivers

All individuals who intend to drive the rented vehicle must be listed with the rental agency for insurance purposes. Vehicles rented under the above discount contracts normally include additional driver coverage at no extra cost, but all the drivers must be listed. The University's insurance will cover non-employees such as spouses or companions who are listed with the rental company as drivers, but only in conjunction with the official travel for which the vehicle was rented.

Personal Car Usage Guidelines

Mileage reimbursements for persons who choose to drive rather than fly should not exceed the lowest common air carrier rate available at the time travel was authorized. Documentation of lowest airfare should be provided with the travel, along with a reasonable rental car rate if one would have been needed at the destination point. It is the responsibility of the owner of the vehicle being used for business to carry adequate insurance coverage. The University does not provide collision and comprehensive insurance coverage for privately owned vehicles that might be involved in accidents while being used on University business. By using his/her personal vehicle for University business, the traveler accepts this responsibility.

Expenses for the maintenance and repair of privately owned vehicles used for business are the responsibility of the traveler. This cost should be covered by the mileage per diem.

If the traveler chooses to drive to their destination, they will be reimbursed for mileage from their normal workplace. For example, if you choose to drive to Indianapolis and leave from your home in Cincinnati (which is 111 miles one way according to Yahoo Maps) you will only be reimbursed for 89 miles (which is the mileage from Oxford to downtown Indianapolis). If there are circumstances that would increase this mileage that we may not know about, such as a detour or bad directions, please explain this on the travel form and it will be taken into consideration when verifying the mileage.

Travel to Terminals

Personal automobile travel may be reimbursed between the employee's normal workplace and the necessary air terminal. If the employee's departure is from his or her home, he or she may be reimbursed for the mileage from home to the necessary air terminal, not to exceed the amount reimbursed if he or she had departed from the workplace. The traveler will be reimbursed for the least amount of round trip mileage according to the following chart.

| | |
|---|-----------|
| Oxford to Cincinnati airport | 110 miles |
| Oxford to Dayton airport | 116 miles |
| Oxford to Indianapolis, IN airport | 204 miles |
| Oxford to Richmond, IN airport | 55 miles |
| Hamilton to Cincinnati airport | 90 miles |
| Hamilton to Dayton airport | 90 miles |
| Middletown to Cincinnati airport | 130 miles |
| Middletown to Dayton airport | 76 miles |
| VOA Learning Center to Cincinnati airport | 72 miles |
| VOA Learning Center to Dayton airport | 90 miles |

Reasonable short-term parking charges will be reimbursed for drop-off and pickup of an employee or university guest at the airport. When travelers cannot leave their vehicles at the airport, round trip mileage will be reimbursed for the drop off and pick up of the traveler.

Parking charges totaling \$50 or more a day require a receipt for reimbursement. If the charges for the day are less than \$50 we do not require a receipt but an explanation on the travel report will suffice. This \$50 a day should also include taxis, tolls and parking fees, etc. So if you have a \$25 taxi ride and two parking fees for \$12.50 each but no receipts, this would make up your \$50 a day no receipt allowance.

Mileage reimbursement for car pooling is only eligible for the driver.

A record must be kept of the dates driven to the campus. At the end of each semester, employees must file a university travel report with the Accounts Payable Office in order to receive reimbursement.

Lost or Excess Baggage

The airlines are responsible for compensating the owners for lost baggage. The University will not reimburse travelers for personal items lost while traveling on business.

Employees will be reimbursed for excess baggage charges only in the following circumstances:

- when traveling with heavy or bulky materials or equipment necessary for business;
- or,
- when traveling for more than fourteen (14) days.

Unused, Voided, or Canceled Airline Tickets

Unused airline tickets or flight coupons have a cash value and therefore must not be discarded or destroyed.

When a trip is canceled after the ticket has been issued, the traveler should ask about using the ticket for future travel. For a small change fee, many tickets can be used for future travel. Therefore, non-refundable tickets should be returned to the travel agency. Unused tickets should not be included with University [Travel Expense Reports](#).

Personal Meal Expenses

Travelers will be reimbursed for personal meal expenses according to actual and reasonable costs accompanied by original receipts (not exceeding federal per diem rate), or on a per diem basis using the per diem rates set by the IRS.

Please note that travelers must choose either to file actual expenses or claim per diem.

Mixing methods for the same trip is not allowed.

Per Diem Rates

Meal allowances and incidental expenses may be reimbursed when the traveler is on authorized travel status within the following time frames:

Breakfast: beginning prior to 7:00 am and continuing until after 9:00 am

Lunch: beginning prior to 11:00 am and continuing until after 1:00 pm

Dinner: beginning prior to 5:00 pm and continuing until after 7:30 pm

NOTE: Meals are not reimbursable unless the traveler is in overnight travel status. (See Internal Revenue Code Section #274 and [Ohio Revised Code](#) Section 126-1-02-7-D.)

The following is the link to the allowable per diems:

http://www.units.muohio.edu/controller/prod/accounts_payable/?showme=Per_Diem_new.htm

The Continental United States standard rate for M & IE is \$39 and applies to all locations **not** specifically identified as having a higher per diem rate. The per diem allowance for specific cities carrying a higher rate is located on the Accounts Payable website under New Per Diem Rates. Incidentals are to be used as gratuities for meals and baggage handlers.

Meals outside the Continental U.S.

Reimbursement for meals is authorized at the maximum rate of \$80 per calendar day if the traveler is conducting business outside the Continental U.S.A. Canada and Mexico are included in this rate.

| | |
|------------------|----------------|
| Breakfast | \$17.00 |
| Lunch | 23.00 |
| Dinner | 40.00 |
| | ----- |
| Total | \$80.00 |

Conferences and Special Meals

Reimbursement may be made for meals in excess of per diem, when such meals are an integral part of a conference or seminar and an original receipt showing proof of payment is attached to the travel expense report. When a meal is claimed in connection with a seminar or conference registration, that meal's per diem should not be claimed. In the case of hosting, the names of attendees and their relationship to Miami University must also be provided.

Procedure After Travel:

Reimbursement Procedure

Reimbursement of travel expenses are requested by completing a [Travel Expense Report](#). These forms are found online at the Accounts Payable website under Travel Form. In completing the [Travel Expense Report](#), the following documentation is required:

- **The name and address of the traveler** (please confirm that you have enough travel from your department or grant to cover these reimbursements).
- **Items of travel, date, beginning and ending times, intermediate stops, and destinations**
- **Expenses incurred for transportation, lodging, meals, registration and any other reimbursable item**

Documentation Required

The University requires travelers to submit the following original documentation to substantiate expenses on their expense report forms:

- **Air/Rail:** Original passenger receipt or e-ticket printout.
- **Hotel:** Original zero balance itemized hotel bill providing proof of payment.
- **Car Rental:** Original car rental agreement providing proof of payment.
- **Meals:** Meal receipts while in travel status, if entertaining.
- **Registration:** (if not prepaid) original receipt showing proof of payment.

All receipts must show proof of payment including who paid the charge and how the charge was paid. If the hotel room was shared and at least two names show up on the top of the bill we will need to have proof of payment (credit card statement) that shows the name of the person being charged this amount.

If the receipt does not provide the above information, the traveler may also be required to submit the canceled check or credit card statement verifying payment. A written statement of the business expense may be requested if the degree of proof is questionable.

International Travel

When international travel occurs and currency conversions are involved, original receipts must be turned in for reimbursement. It is suggested that a credit card statement accompany the receipts to show accurate costs. If the traveler decides to make their own conversions, the exchange receipts should be turned in with the expense receipts. The Accounts Payable office maintains a link on our main website page for the exchange rates of foreign currency. If an international travel is turned in without any conversions, the Accounts Payable office will make the conversions.

Approval/Authorization Process

The following information is required for reimbursement:

- **Traveler's signature:** The traveler must sign and date the expense report.
- **Signing or initialing another person's name is not allowed.**
- **Authorized signature:** The authorized signer must have authorization to sign for the account being charged and be the traveler's direct supervisor, or someone to whom the traveler reports.
- **The authorized signer cannot be the traveler or someone subordinate to the traveler.**