Faculty Travel

The Ins and Outs of Traveling with UNT & SoPHI held Money

Please note any and all travel using any funds, including non-SoPHI awarded funds, requires an approved Travel Request prior to traveling

In the Beginning…

How to Request Funds from the School of Philosophical and Historical Inquiry

Please note while we transition to the School of Philosophical and Historical Inquiry, these policies are subject to change, so please check School email communication regularly

Award Periods

- SoPHI Travel Grants are broken down into 3 Award periods:
  - Fall (For travel from September 1st- December 31st)
    - Deadline for submission: September 1st
  - Spring (For travel from January 1st- May 31st)
    - Deadline for submission: January 15th
  - Summer (For travel from June 1st- August 15th)
    - Deadline for submission: May 1st
  - *<u>Note</u>, no travel can be processed for Aug 16th-August 31 due to UNT closing the fiscal year budget, so funds and systems are unavailable for processing
  - If your trip dates are within a couple of days of a submission deadline, please submit the travel request at the previous deadline. Ex. Trip dates are Jan 15-18, so submit at the Fall Sept 1st deadline, so there's time for a travel request to be approved.

Required Documentation

- The following MUST be included with your application to be considered for funding:
  1. SoPHI Request for Travel Form
  2. Faculty Application for Approval of Leave
  3. A copy of the conference program, invitation, etc… documenting the need for travel
  4. UNT approval of conference membership purchase (if applicable)
  5. If international trip, submit International Travel Registration confirmation

Types of Travel Grants

Large vs. Small Travel Grants

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Large Travel Grant

- Who: Tenure-track, tenured, or full-time lecturers with multi-year appointments
- Only 1 Large Travel Grant per faculty per fiscal year
- Funds Awarded based on table

Large Travel Grant Chart

Estimated Cost of Trip	Maximum Departmental Funding
$600-699	$699
700-799	799
800-899	899
900-999	950
1000-1099	1000
1100-1199	1050
1200-1299	1100
1300-1399	1150
1400-1499	1200
1500-1599	1275
1700-1799	1400
1800-1899	1475
1900-1999	1525
2000-2099	1600
2100-2199	1700
2200-2299	1800
2300-2399	1900
2400-2499	2000
2500-2599	2100
2600-2699	2200
2700-2799	2300
2800-2899	2400
2900-2999	2500
3000 & above	2600

Large Travel Grants- Eligible Scholarly Activities

- Presentations and activities include general session papers, panel paper presentations, concurrent session papers, and keynote/plenary addresses to a sizeable portion of those attending an academic meeting or gathering of a learned society.
- Papers to be presented should be refereed, invited, or the result of some type of program selection review process, appropriate to the presenter's discipline.
  - Open sessions for presentations or posters, for which there is no formal review in advance of the session, are not eligible for a Large Travel Grant.

Large Travel Grant- Eligibility, continued

Funds may be awarded for persons involved in the following activities:

- Making presentations at international or national meetings
- Making invited or refereed presentations
- Making plenary or keynote sessions (defined as presentations to all conference attendees)
- Serving as president/chief operating officer of a national or international organization
- Serving as conference program/planning chair of a national or international organization
- Serving as a member of the conference program/planning committee for a national or international organization

- Priority given to organizations and meetings that are national and international in scope and significance

Small Travel Grants

limit 2 per faculty per fiscal year

- Category 1 ($500)
  - Presentation of research papers at meeting of professional organizations or symposiums
- Category 2 ($400-$500)
  - Participants as chairs of sessions or critics/discussants in meetings of professional organizations, conferences, symposiums, and roundtables for scholars of university status
- Category 3 ($300)
  - Presenting research papers at professional meetings of historical associations not primarily for scholars of university status
- Category 4 ($200)
  - Other professional or quasi-professional travel
    - Examples: travel to accept an award or honor; guest lecturer to a non-professional audience

Important Notes:

- Please remember- these are general guidelines. For more details regarding eligibility, priorities, and limitations, please refer to the official Travel Policy on the History Department website (https://class.unt.edu/history/forms/faculty-forms.html) & UNT Travel Guide (https://finance.untsystem.edu/sites/default/files/documents/unt_system_travel_guide_05-02-24.pdf).
- If you are planning on **ANY** travel, submit RTF form to Miranda Leddy as soon as you know about the trip.
    - ALL travel requests MUST be submitted no less than **one month** before trip start date
    - Do **NOT** purchase anything for the trip before the RTF has been submitted, and Miranda 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 Miranda Leddy, so she can attach 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

What you need to know before traveling

Things to know/have before you travel

Texas Travel

- If you are traveling within Texas, you will need to provide the hotel with UNT's Tax Exempt Certificate

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
- Please note 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

- 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.

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

- 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 Miranda Leddy no later than 2 weeks after conclusion of trip

Meals

- Submit all meal receipts upon your return from travel.
- 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 other personal acquaintance of a UNTS employee will be permitted only when there is a substantial and bona fide business reason for that person's attendance.
- 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

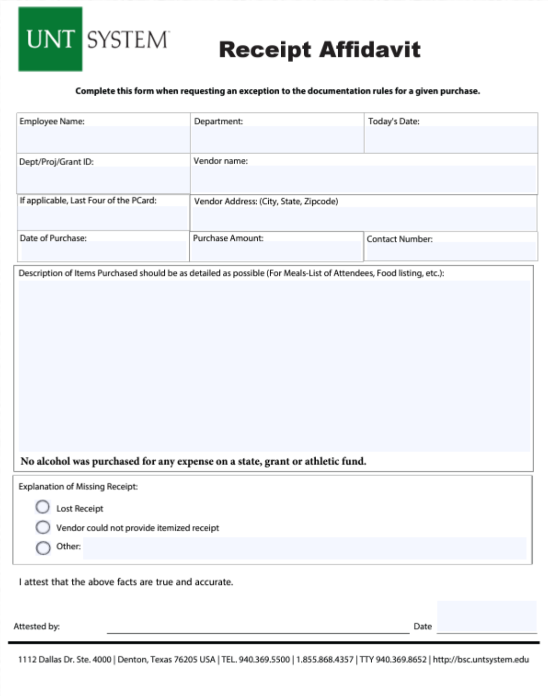
- Reminders:
  - If you are using Per Diem for meals, you must indicate this on your Request for Travel form, otherwise you will be expected to keep track of all your meal receipts and submit them upon your return from travel.
  - Tips/Gratuities for meals are allowed up to 20%

How to submit receipts

- All receipts should be submitted digitally, so please scan them each separately into a PDF document, or submit clear photos, and email them to Miranda at Miranda.Leddy@unt.edu
  - Each receipt should have its own file, instead of being submitted as one large file
- 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.
- 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.

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 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

- 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!

Submitting Travel Authorization Requests and Reimbursements via Coupa

Approving Coupa Reports

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

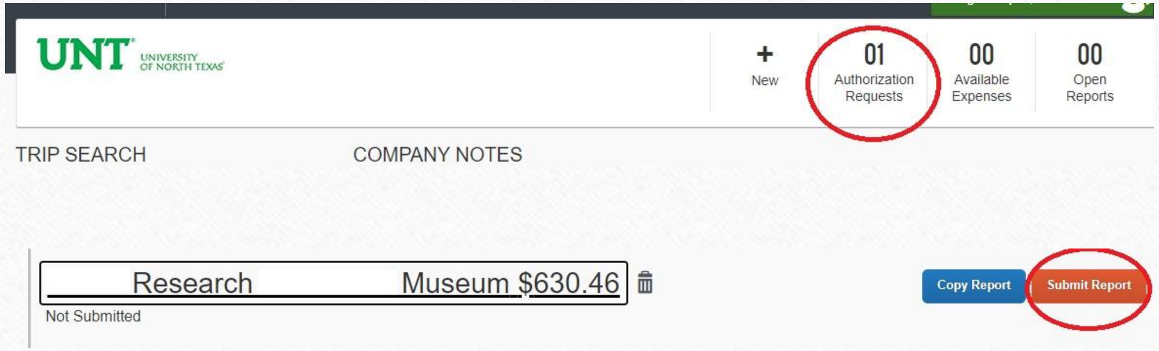
Once the trip is approved, you should receive an email notification from Coupa

This report can be reached at 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



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

Travel Cycle

Decide to Travel

Submit Request for Travel Form to Miranda and receive approval from SoPHI

Submit Travel Grant Applications as applicable

Miranda will notify faculty member to review and submit travel request

Travel

Submit receipts to Miranda

Miranda will notify faculty member to review and submit Expense Report

Reimbursement

Travel/Grant Opportunities across UNT

*Check websites regularly for updates to application deadlines.

- CREATE Grants – applications typically due Aug 31 for each academic year
    - CREATE awards may provide $4,000 in reimbursement to a faculty member's department for travel and other related expenses for scholarly or creative activity with a new collaborator at an institution (e.g., academic institution, laboratory, industry facility related to one's field of inquiry, etc.) outside the DFW area.
    - **Award Range:** $4,000 - $5,000
- Faculty Career Development Grants – applications typically due the 3rd week of August for each academic year
    - May be awarded for travel expenses for co-presenting with a mentor at a professional conference
    - **Award Range:** $500 - $4,000
- Global Venture Funds – applications typically due mid-October for fall and mid-March for Spring
    - Funding supports UNT faculty undertaking international collaborative projects involving collaborative research or creative scholarly activities with universities, institutions, archives, or museums abroad.
    - Max award amount is $3000
- Please note that some grants require a fund match from your School, so discuss this with School leadership prior to applying

Travel Links

- SoPHI Travel Forms
- Contact: Miranda Leddy

  WH 225A

  Miranda.Leddy@unt.edu

  940-369-8932