

UCLA Doctoral Student Travel Grants for Conferences, Professional Development and Off-Campus Research (DTG) Checklist for Students

Effective Fall 2016 for new entering UCLA doctoral students on all travel on or after 9/19/2016
Effective July 2016 for eligible continuing UCLA doctoral students on all travel on or after 7/1/2016

Student Eligibility

- I am a UCLA Doctoral Student pursuing a PhD, DEnv, DrPH, or DMA degree objective
- I have not exceeded 7 years within my doctoral program
- I will be registered/enrolled continuously in at least 12 units during the entire term when travel occurred (for academic terms only)
 If this is a **summer reimbursement** (no summer enrollment is necessary):
 I was registered/enrolled for the preceding Spring and will be registered/enrolled in at least 12 units for the following Fall
- I will not be on filing fee during my time of travel
- I will not be on leave of absence, lapsed (on unapproved leave), or withdrawn during the term of my travel
- I do not have any unresolved incompletes (I grades)

Reimbursement Eligibility

- This reimbursement is for a conference/research/professional development activity
- I have not submitted a reimbursement request for this activity to Graduate Division and/or my department
- I am submitting my reimbursement application within 45 days of travel
- The reimbursement amount is at least \$100
- This conference/research/professional development is approved by my faculty mentor
- My travel dates occur on/after the mentioned date:
New Students: All travel on or after 9/19/2016
Continuing Students: All travel on or after 7/1/2016
- My expenses conform to [UCLA travel policy](#) and I have included the completed [Conditions for Travel Form](#)
- I have attached itemized receipts (copies or originals accepted); loose receipts are taped to an 8.5" x 11" piece of paper in chronological order; bank/credit card statements for expenses if mode of payment is not indicated on receipts
- I have included the supplemental information regarding my conference/research/workshop:
- For presenters: title, authors (include affiliations if different from the student's UCLA department/program), the accepted/published abstract of the work presented (if applicable) or synopsis, and the invitation/registration for the conference attended
 - For participants in workshops or related professional development activities: provide a brief (150 words or less) explanation of the professional development training or activities, and the invitation/registration for the workshop attended
 - For field research: Provide a (150 words or less) synopsis of the work and justification for the travel

Student Signature	Date:	
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If all above apply, you may proceed with completing the DTG form.
 If one or more conditions do not apply, **STOP**. Your submission does not qualify.

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Deadlines:

Airfare & conference registration: Reimbursement can be provided before the departure date or within 45 days after travel has been completed.
All other expenses: Reimbursement must be requested after travel, within 45 days after travel has been completed.

UID:	<input type="text"/>	Name (Last, First):	<input type="text"/>	
E-mail:	<input type="text"/>	Department:	<input type="text"/>	
Reimbursement Type:	<input type="text"/>	Participation:	<input type="text"/>	
Conference Location:	<input type="text"/>	Conference Dates:	<input type="text"/>	Through <input type="text"/>
Conference/Workshop Title:	<input type="text"/>			
Title of Paper:	<input type="text"/>			

Travel Information:

Departure from:	<input type="text"/>	Date:	<input type="text"/>
Arrival to:	<input type="text"/>	Date:	<input type="text"/>

INCOMPLETE DOCUMENTS WILL NOT BE PROCESSED

The funds are paid in the form of a stipend. For international students, this means that appropriate taxes will be withheld. Note: According to UCLA travel policy, transportation/lodging combined as a packaged travel deal cannot be reimbursed, unless the vendor provides a breakdown of all expenses and applicable taxes (such as airfare, airfare tax, room rate per night and room tax per night).

- Conditions for Student Travel Form (<http://grad.ucla.edu/asis/stusup/travelcndtns.pdf>) must be signed and submitted with this form.
- You must submit original or copies of receipts indicating mode of payment with this form. Tape receipts to an 8.5" x 11" piece of paper.
- If claiming Mileage (for personal vehicles only) provide: Google Maps visual indicating your trip and proof of insurance

Expense Description	Expense Amount
Airfare	
Transportation (taxi, train, car rentals, gas purchases for rental car, etc.)	
Mileage Miles <input type="text"/> x 0.54 for travel in 2016 Miles <input type="text"/> x 0.535 for travel in 2017	
Lodging	
Meals during trip (Itemized receipts only, no alcohol reimbursement, no groceries) *effective for travel occurring on or after October 15, 2017, the new cap will be \$62/day	
Conference/Workshop registration and fees	
Other allowable expenses (please list):	
Total Expenses	

I certify that these expenses have not been previously reimbursed and that all expenses conform to UCLA Travel Policy

Faculty Mentor Signature _____ Date:

Student Signature _____ Date:

Faculty Mentor E-mail _____

Please return to Graduate Fellowships & Financial Services, 1228 Murphy Hall, MC 144401. Questions? Call (310) 825-1025. uclafellowship@grad.ucla.edu

For Graduate Division Use:

Available Balance: _____

Reimbursement Amount: _____

Processed by (Initials): _____ Date: _____

UCLA Doctoral Student Travel Grants for Conferences, Professional Development and Off-Campus Research (DTG) Supplemental Information

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- For presenters: title, authors (include affiliations if different from the student's UCLA department/program), the accepted/ published abstract of the work presented (if applicable) or synopsis
- For participants in workshops or related professional development activities: provide a brief (150 words or less) explanation of the professional development training or activities, and the invitation/registration for the workshop attended
- For field research: Provide a (150 words or less) synopsis of the work and justification for the travel

Activity Type:

GENERAL CONDITIONS FOR STUDENT TRAVEL

AIRFARE

- All airfare, hotel, and car rental receipts must be itemized. Do NOT book travel packages that include hotel + airfare + rental car for one price (e.g., Expedia, Travelocity). *UC Policy prohibits purchase of travel/vacation packages from Internet vendors. These packages lump airfare, hotel, and car rental into a package price, and therefore travelers are unable to obtain itemized documentation as required by the IRS.*
- Only coach airfares are reimbursable.

LODGING

- Likewise, only hotel room rate, room tax and parking are reimbursable. Extraneous expenses such as gym fee, movies, videos, newspapers, magazines, etc., are NOT reimbursable. The name on the bill must be your own. If you are sharing the room, ask the hotel to provide a bill for each occupant. You will need to give your credit card as a deposit. Lodging expenses are not reimbursable prior to the trip nor are lodging expenses reimbursable for travel within a 40-mile radius of student's home or UCLA, whichever is the point of departure. If you order room service, be sure to keep the itemized receipt and submit that along with your zero-balance hotel bill.

REGISTRATION FEES

- Conference registration fees can be reimbursed before the trip has been completed. Non-business related expenses, such as social functions, golf, cruises, will NOT be reimbursed. Please keep a copy of agenda, flyer or invitation AND itemized receipt reflecting form of payment.

TRANSPORTATION

- It is encouraged to book rental cars through UCLA's preferred car rental companies (currently National, Enterprise or Hertz). Do not take additional collision, accidental death or medical insurance, as the UCLA rate includes this coverage free of charge. Only economy and compact cars are reimbursable. Extraneous expenses, such as rental upgrades, GPS systems, child car seats, etc. are not allowed. For rental cars, gas is reimbursable.
- Ground transportation, such as bus, taxi, subway, shuttle, is reimbursable with receipt.
- You may use your private automobile if you carry insurance necessary to satisfy state law financial responsibility. When using a privately owned automobile, travelers are reimbursed according to mileage, at the 2017 rate of 53.5¢ per mile (2016 rate of 54¢), and therefore, gas purchases are NOT reimbursable.

MEALS & INCIDENTAL EXPENSES

- Meals are reimbursed on an actual basis. Submit itemized meal receipts for reimbursement. We can no longer accept just the credit card receipt without the itemized dining details. The maximum allotment per day, including gratuity, bellhop tips, etc., is currently \$72 (effective for travel occurring on or after October 15, 2017, the new cap will be \$62/day). Alcohol and tobacco purchases will NOT be reimbursed. Meals and incidental expenses for travel less than 24 hours cannot be claimed.

OUT-OF-POCKET USE OF FUNDS

- In the case of multiple employees or students traveling to the same event, do NOT share or split costs for meals, rooms, transportation, etc. Reimbursement expenses are tracked per individual and not per event; therefore, expenses must be paid per individual only and cannot be shared or split.

TRAVEL REIMBURSEMENT PROCESS

Upon returning from your trip, the receipts must be submitted within 45 days. Failure to submit within this time period may result in the non-reimbursement of funds. All receipts must be affixed with clear tape to 8 ½" x 11" white paper and placed in chronological order. Do not staple receipts. A complete reimbursement request package includes:

- Original or copies of detailed, itemized receipts for ALL expenditures, clearly indicating the amount, method of payment and zero balance.
- Proof of conference attendance, include a copy of conference agenda, schedule, flyer or invitation.
- If using a personal vehicle, proof of valid liability insurance is required.
- A completed and signed (by traveler and faculty mentor) Doctoral Student Travel Grant form or other pertinent travel request form.

It is the traveler's responsibility to submit all documentation for the entire trip. Even if certain costs were pre-paid by the Graduate Division, the reimbursement request package must reflect ALL costs and expenditures associated with the specified trip. Submit completed forms to:

UCLA Fellowships & Financial Services
1228 Murphy Hall, Box 951444
Los Angeles, CA 90095-1444

I, _____ (name), have read and understand the above conditions. I also understand that if I have questions or am unclear on Travel & Entertainment policy, I should ask BEFORE incurring expenses. I also understand that the above conditions only reflect a portion of the UC Policy for Travel and Entertainment and that I should refer to the UC Travel Center website for policy as necessary. I also understand that failure to abide by UCLA Graduate Division's *General Conditions for Student Travel* may result in a non-reimbursement of funds.

Signature of Traveler

Printed Name of Traveler

Date

Re: _____

Scheduled Trip Location, Purpose, Dates of Travel

RESOURCES

UCLA Travel Center
10920 Wilshire Blvd., Suite 500
Los Angeles, CA 90024-1433

Phone: (310) 206-2639 or (800) 235-UCLA
Fax: (310) 794-2703

Email: travel@finance.ucla.edu
www.travel.ucla.edu