

## Business PhD Travel Procedures

Effective January 13, 2022, **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 they are travelling on University business (ie to conferences, for research, on the job market) which are to be paid by U of A funds (your PDA/TEA or a supervisor's funds). If you are travelling for personal reasons using your own funds, you do not need to follow this procedure.

1. Request approval from your supervisor to use your PDA/TEA funds, or to use their research funds to support your travel. **Include a budget of expenses** (use [Request to Use Travel and Expense Account Funds \(Excel\)](#) from the Forms and Policy cabinet). Send the approval email and approved budget to [busphd@ualberta.ca](mailto:busphd@ualberta.ca). If supervisor funds are being used, the speed code must be provided. The PhD office must have this information BEFORE you book your travel.
2. Create a [Concur travel profile](#) to record your legal/passport/personal travel information. Do not enter flight request here.
3. Email [ualberta@maritimetravel.ca](mailto:ualberta@maritimetravel.ca) and copy [busphd@ualberta.ca](mailto:busphd@ualberta.ca) to book your flight. **You must email them from your @ualberta email address.** Include the following information in your email to Maritime:
  - a. Your full name as it appears on your passport;
  - b. Your citizenship and passport number;
  - c. Your date of birth;
  - d. Your mobile phone number;
  - e. The dates you need to travel, your destination, window/aisle preference, and any other details about your trip required to book flights. If you collect airline points include your membership number.  
[Note: If you have scouted the flights you want, you can let them know what they are. However, Standard Fare tickets are booked to protect the university with cancellation/refund/insurance coverage and provide services that are not usually included with low advertised fares you might find. The flights/fares you may want may not be available but Maritime agents will work with you for the best arrangements possible. They add an agency fee of \$31.50 to the ticket cost.]
  - f. Tell Maritime you are a Business PhD student and have notified the PhD office about the booking and for them to contact Debbie or Helen at the PhD office for payment (Helen obtains TAP number which requires the trip information, speed code and total cost; or will pay by PhD credit card. Students CANNOT pay for their own flights and expect to be reimbursed). Our contact info: 780-492-5816 or [busphd@ualberta.ca](mailto:busphd@ualberta.ca).
  - g. Copy [busphd@ualberta.ca](mailto:busphd@ualberta.ca) on your initial Maritime request email and confirm your final flight selection. With the confirmed flights Helen will obtain the TAP number and inform Maritime.
4. Contact Helen or Debbie to pay for your association memberships and conference registrations. Do not pay any expenses with your own card that can be paid (before you travel) by the PhD office.
5. If travelling to a major Canadian city, you must check [approved HAP hotels](#) which might offer reduced rates for U of A. Check for rate availability and determine if there is a saving to book a

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HAP hotel. Conference-specific hotels may cost more but MAY be more economical in saving extra taxi/transportation expenses for a HAP location (do the math!).

6. You may reserve hotel rooms with your personal card or request for the PhD Credit Card to be used. If the hotel offers secure credit card pre-payment arrangements, you may request for the PhD office to submit its credit card information to the hotel (covers room charges only). This alleviates you from having to carry personal credit card charges until you can be reimbursed.
7. Within 30 days of returning from your trip you must submit all related conference/travel invoices and receipts to the PhD office as a travel claim. Complete and include the Checklist to ensure all items for a claim are identified. Electronic receipts are preferred (do not hand in paper receipts; please scan).
8. Per diems for meals are preferred (meal receipts not required unless you were hosting a meal). State which meal per diems (supplied meals by conferences cannot be claimed for per diem. Conference agenda must be submitted with the claim.)
9. See the Travel Claim Info sheet for additional, detailed information on submitting claims.