HDR Student Travel Procedure – Travel Funding and Approvals

Travel and Research Funding is a benefit – not a right – therefore you must apply for and receive approval for travel and travel funding. The Business School strongly supports research and has procedures in place that must be properly followed. Receiving approval to travel does not automatically approve funding; you must also apply for travel funding.

All Funding: (Travel and Non-Travel)

- The first avenue for travel funding is the $1,850 available from the GRS [http://www.postgraduate.uwa.edu.au/students/funding/travel](http://www.postgraduate.uwa.edu.au/students/funding/travel)
- For the rules surrounding GRS Funding please see: [http://www.postgraduate.uwa.edu.au/students/policies/travel-award](http://www.postgraduate.uwa.edu.au/students/policies/travel-award)
- GRS may refuse your application if you have outstanding Milestones.
- In addition, you may apply for School funding for either travel or non-travel.
- **Research Funding** --- The Business School will fund justified research costs up to a maximum of $3,500 for a PhD or DBA, and $1,750 for an MPhil. The School will only provide funding for conferences if you are presenting at the conference.
- **Budget** --- you need to draft a budget to include all anticipated expenses such as airfare and other transport, accommodation, conference fees, meals etc. You must do this in order to know how much money you are applying for. A copy of the budget must accompany the travel application form.
- When travelling, be sure to keep tax compliant receipts for all expenses; you will need to present these to your travel arranger if you are claiming reimbursement.
**Step 1: Getting started**

**Timing:** You must start the process of applying for funds and seeking travel approval **at least three months prior to travel**, preferably even earlier, particularly for overseas travel.

**Booking:** **DO NOT book or pay for airfares yourself.** Doing so may nullify your application and the School may not pay for your trip.

**Due diligence:** **Be sure to read forms and instructions carefully and patiently.** They are provided in order to help, but if you skip sections or miss—read questions it will cause considerable delays in processing and may prevent you from traveling.

Funding for research travel comes from **TWO separate sources**; some funding comes from the Graduate Research School and other funding comes from the Business School. You must use travel funding from the Graduate Research School **first**. The Business School Research Office travel arranger will facilitate this for you.

**Step 2: Supervisor support**

Discuss your travel plan with your supervisor and be sure you have supervisor support. Approval and funding for travel are only granted where you can demonstrate that the trip will be beneficial to your research.

**Step 3: Compile your GRS Forms**

For students who have not exhausted their GRS travel allocation of $1,850. Apply for the first stage of funding by working carefully through the checklist below; this will ensure that you provide the Graduate Research School with all the information that it requires to support and approve your research travel.

- **a)** Does your research travel involve air travel *(National or International)*? If yes, download a **Travel Grant Application Form (TAA)** from GRS Forms. **YOU MUST NOT BOOK OR PAY FOR THE TRAVEL ITSELF.** *(nb : GRS will not usually award grants for travel costs within WA. You must apply for School funding instead)*

- **b)** When you have downloaded and read the TAA form, you must obtain a detailed airfare quote from either TERTIARY TRAVEL or CAMPUS TRAVEL *(these are UWA’s only approved travel providers. Do not use other travel agents or book online).** Please ensure that you inform the travel providers that “**this is a quote and travel will be booked & paid for by the University through Trobexis”**.

- **c)** If you are taking any leave during your travel, you must complete an **Overseas Travel Form (OST)” from GRS Forms**.

- **d)** **Will you be taking any personal leave while you are away? Note that travel insurance for the time you are taking personal leave is your responsibility; you will not be covered under the University travel insurance policy.**
If you have previously used your GRS funds, or the trip will cost more than your GRS funds then continue to step 4.

**Step 4: School Funding**

Apply for the second stage of funding from the Business School. Work carefully through the checklist below; this will ensure that you provide the School with all the information that it requires to support and approve your research travel.

a) Prepare a budget showing all anticipated costs:
   - airfare costs;
   - conference costs;
   - accommodation costs;
   - other anticipated travel costs such as meals and local travel (please explain these costs clearly).

A budgeting table is provided in the HDR Student Travel Approval Form.

b) Download a copy of the HDR Student Travel Approval Form (available from http://www.business.uwa.edu.au/staff/policies/?a=2332435)

c) This form can be used for both travel and travel funding requests. It must be completed and signed by yourself and your coordinating supervisor, and then returned to the Research Office travel arranger to be approved by the Discipline Graduate Research Coordinator. The form is designed to cover different sorts of funding requests, as well as Travel Approval so work through it patiently and determine which sections are relevant to your needs. Make sure you tick all relevant boxes and provide all required information. If you have any queries, contact the Research Office travel arranger in the first instance.

When travelling, be sure to keep tax-compliant receipts for all expenses. You will be required to produce these to the Research Office for reimbursement of expenses.

**Step 5: Travel Approval only**

- If you are traveling but using your own money, Scholarship Funds, external Research Grant funds etc. you still need to apply for Travel Approval.

- Use the same HDR Student Travel Approval Form and only tick the box for Travel Approval. You will still need to attach an itinerary and fill in relevant dates etc.

- You MUST email a copy of the signed approval form and your itinerary to travel@uwa.edu.au

- You may book and pay for your own flights through any provider.

- You will still need GRS Overseas Leave approval if travelling overseas. Check with the Research Office.
Travel Funding and Approvals Checklist

- Milestones are all up to date (if you are not sure please check with the Research Office)
- Discuss your plans with your Coordinating Supervisor. Your Supervisor must support your application for it to be accepted.
- Funding is available for purposes other than travel. Please discuss your plans with your Supervisor, and use the same application form and attach quotes and budgets where relevant.
- Have you used your GRS funding? --- if No then you must apply for those funds first or simultaneously.
- Check your available funding with the Research Office travel arranger.
- Draft a Budget – you need a budget to include all anticipated expenses. This must be included with your application. A table is provided on the form.
- Draft a supporting statement – This should include why you wish to travel and how you will benefit from the research. The statement may be written into the application form or attached as a separate document.
- Arrange a quote from either Campus Travel or Tertiary Travel. This must be attached to your application.
- Are you traveling Overseas? – if yes then you must also apply for GRS Overseas Travel Approval.
- Are you taking Personal/ Recreational Leave within your research travel trip? ---if Yes then you may need to apply to GRS for Annual Leave. ---if Yes then you will need to arrange private Travel Insurance for personal leave dates.
- Fill in the HDR Student Travel Application Form online and print for signing. Submit the form with all of the required attachments to your Supervisor for approval, then to the Research Office for final approval.