



PhD Student Travel/Research Funds Policies & Procedures

Johns Hopkins University - Department of Cognitive Science

Updated February 2022

Annual Allowance: Each resident PhD student is eligible for an allowance of **\$1,500** a year for business-related travel expenses and research expenses for the first five years. It can be used for travel to conferences, workshops, research-relevant summer schools; training; and for research expenses.

Allowable research expenses include payments to experimental subjects (including online experiments), payment for scanner or other relevant equipment time, and purchase of equipment that is necessary for research. Allowable expenses do not include the purchase of laptops. The logistics of each research expense can vary widely. After receiving pre-approval, consult with Sue Potterfield before making any purchase.

The travel/research expenses must be ones that are not specifically covered by the student's or mentor's grants.

Students who use their travel/research allowance for travel must present at the conference/workshop or provide or provide a rationale that it serves an explicit training purpose. Exceptions are made for First Year PhD students, who may use up to **\$500** of their travel/research allowance to attend, but not present, at a conference or workshop.

Unused funds cannot be extended or rolled over into subsequent years. Special requests for advances of funding from an upcoming year may be considered, but are not guaranteed approval.

Students may consult mentors and the Travel Chair with specific questions on allowable expenses.

Other Funding Sources: Students are expected to seek out alternative funding options before resorting to use of travel/research allowance. Alternative funding options may include faculty budgets or sponsored (grant/fellowship) budgets. Speak with the responsible faculty or PI.

Students must apply for Graduate Representative Organization ([GRO](#)) [conference grants](#) whenever eligible as well as to any other applicable conference/workshop travel grants for which they are eligible.

Procedure:

1) Pre-approval: All travel/research expenses require pre-approval. Students should not make travel arrangements until approval is received. Retroactive requests will not be accepted.

Submit a **Graduate Student Travel/Research Request Form** for each new research expense or trip request. Email submission is preferred. Find form here: <https://cogsci.jhu.edu/department-resources/travel-resources-forms>. Students should submit the approved form and related emails to the budget staff prior to any purchase.

Required Approvals if requesting...

- Faculty/Grant/Fellowship Funds – Responsible Faculty/PI approval required.
- Travel/Research Allowance – Advisor and Travel Chair's approval required. Submit at least one month prior to the trip. Within 5 business days of receiving the advisor's recommendation, the student will receive the final decision of the Travel Chair.
- Policy Exception Request – Department chair's approval is additionally required. Include a justification.

2) Purchasing: Students are expected to consult JHU and KSAS policy documents regarding their planned expense categories. Find links here: <https://cogsci.jhu.edu/department-resources/travel-resources-forms>. Students are highly encouraged to book air, rail, and lodging using [Concur](#) or TripLink. Negotiated rates are built in.

Pre-trip Reimbursements: Permitted ONLY for purchases booked using Concur or TripLink. All other purchases must be submitted after the trip. The '**60-day rule**' (next page) applies to all reimbursements.

Exception: If a deposit is required to secure a room in a conference hotel 'block' far in advance, that may be expensed outside of Concur and submitted for reimbursement before the trip with the caveat that *if the trip/hotel is cancelled the University must be repaid.*

3) Receipts: Students must keep all original, itemized receipts related to their business travel and research expenses; this is required, regardless of the method of payment (personal credit card, dept P-Card, dept direct bill, etc.). Receipts must show proof of payment (ex: VISA ****1234). If receipts do not show proof of payment, also provide a corresponding bank or credit card transaction.

4) Receipt Submission and Reimbursement Expense Reports

- **Dept P-Card:** Forward receipts to P-Card holder ASAP and mention the expense type (e.g. membership, conf. registration, MTurk, Prolific) and which account is to be charged.
- **Dept Travel Direct Bill:** Provide receipts and hotel folios to budget staff ASAP. Direct billing is possible for hotel (incl. AirBnB), air and train purchases. Inquire with office staff for procedure to request this option.
- **Reimbursements: (1)** Create a [Concur](#) Expense Report and upload all receipts. Complete the general 'header' information. The earliest and latest transaction dates are the start and end dates. Skip the budget section, but type a comment naming the budget(s) to be charged. Upload and attach each receipt. It is OK if you encounter errors. **Do not submit the report. (2) Notify the budget person (your Delegate*) the report is ready for review.** The Delegate will input budget info, fix errors, address questions/concerns, then submit on your behalf. (*[Add an Expense Delegate](#); [Create an Expense Report](#); [Other Concur Help Docs](#))

60-day rule: All reimbursable purchases must be submitted in Concur within 60 days of the transaction date. Late submissions become taxable income. For practical reasons, the department requests reimbursement expense reports be prepared and provided to staff within 45 days to allow for processing time.

5) How will I get reimbursed? Concur sends auto-notifications on expense report status. The reimbursement will be direct deposited into the student's bank account. All PhD students should have direct deposit set up in payroll. Small or simple reimbursements can take a few business days. Larger or more complex reimbursements may take a couple weeks. Please advise staff if you face a potential financial hardship.

Questions? Contact: Sue Potterfield, Budget Analyst, potterfield@cogsci.jhu.edu, (410) 516-5100, Krieger 237D

Some Quick Expense Tips and Considerations

- **Sales Tax:** JHU is MD sales tax exempt. If purchasing research supplies or business meal with a personal card or dept P-Card, ask the vendor to remove sales tax. Ask staff for a Sales Tax Exemption Certificate.
- **MTurk/Prolific:** Must use a department account and P-Card. Consult with budget staff.
- **Concur App:** Download for a convenient way to book travel and upload business expense receipts.
- **Membership & Conference Fees:** Non-travel fees should be charged on a dept. P-Card whenever possible. Students should take advantage of "student" and "early bird" discounts. Membership fees can only be charged to non-sponsored accounts.
- **Airfare/Rail/Lodging:** Book on Concur/TripLink whenever possible. Either ask how to bill the department directly or pay out of pocket then request reimbursement. Inquire with staff about direct billing process.
- **Airfare:** If traveling on sponsored funds, the airline must be an American Flag carrier (FAA-compliant).
- **Lodging:** If lodging at a hotel, collect a folio before departing. Send this to the budget staff (if used direct billing) or include it in your reimbursement expense report (if paid out-of-pocket).
 - **Split Lodging:** If planning to split lodging with Hopkins affiliates or non-affiliates, first discuss with staff. Staff will make a recommendation based on the specific circumstances and budgets involved. Never use cash to pay for or accept payment for split lodging. Always have a 'paper trail' via credit card, PayPal, Venmo, etc.
- **Mileage:** In a Concur expense report, provide the start and end addresses; the system will calculate the reimbursement based on the IRS rate. Parking and toll receipts can be expensed, too.
- **Foreign Currency:** Concur will automatically calculate foreign currency conversions for reimbursement. Ensure you input the correct foreign city of purchase and currency type.
- **Travel Meals:** Student meals may be reimbursed based on actual receipts up to \$30 per day (dept rule) if traveling outside the Baltimore metropolitan area. Alcohol will not be reimbursed. If traveling on sponsored (grant/fellowship) funds, specific agency rules may apply.
- **Missing Receipt:** All efforts must be made to recover a missing receipt. A Missing Receipt Declaration can be submitted in Concur. MRDs are not allowed for airfare/rail, lodging, and car rentals.