

PGR Student Travel and Accommodation Booking Process using the Key Travel Portal

Process	CDT students	IGS students	Responsible person	Notes
Step 1	<p>Student submits a CDT Funds Request Form (FRF) and Leave of Absence (LoA) request (if trip is going to be > 2 weeks).</p> <p>If the trip is abroad, students should also submit their completed risk assessment to support the insurance request.</p> <p>https://www.ed.ac.uk/staff/business-travel/travel-safety/risk-assessments-travel-plan</p>	<p>Student submits application for IGS travel funding and Leave of Absence (LoA) request (if trip is going to be > 2 weeks)</p> <p>If the trip is abroad, students should also submit their completed risk assessment to support the insurance request.</p> <p>https://www.ed.ac.uk/staff/business-travel/travel-safety/risk-assessments-travel-plan</p>	Student	<p>Students should provide an estimated expected spend figure, which includes estimates of all costs for which they wish to be reimbursed and which allows some leeway for price fluctuations that are likely to occur between funds approval and time of booking.</p> <p>If travel is international, students should confirm they are in possession of a valid passport (with at least 6 months validity) for dates of expected travel.</p>
Step 2	Budget holder asked to approve requested spend (CDT Directors)	Budget holder asked to approve requested spend (DD-IGS / IGS Manager)	CDT Admin / IGS Coordinator	
Step 3	CDT Administrator informs student of approved budget spend. Student invited to continue to KT portal to search for their preferred travel and accommodation itinerary.	IGS Coordinator informs student of approved budget spend. Student invited to continue to KT portal to search for their preferred travel and accommodation itinerary.	CDT Admin / IGS Coordinator	If student is waiting to hear about conference acceptance, they should be instructed to obtain this confirmation before progressing to KT online search.
Students should only create & save travel quotes once they have received approval for the requested funds.				
Step 4	<p>Student logs into KT portal and creates / saves their preferred travel and accommodation itinerary within the limits of their approved spend (and also in accordance with the University and UKRI/EPSRC travel and expense policies).</p> <p><i>See the "Step by step guide on how to register and search for travel using the Key Travel Online Portal for Students"</i></p>		Student	It is highly preferable and recommended that all travel and accommodation is booked via KT portal, as this avoids students incurring personal expenditure (but see note 8 if accommodation is to be booked off line).

Step 5	Student shares (via KT portal) the preferred itinerary with CDT Administrator.	Student shares (via KT portal) the preferred itinerary with IGS Coordinator.	Student	
Step 6	CDT Admin / IGS Coordinator checks that the planned itinerary is compliant with the approved FRF and University policies on travel and expenses. <i>If planned itinerary is more than approved budget, additional funds should be requested and approved, or student asked to amend proposed itinerary. Student should be asked to amend itinerary if it does not look to comply with applicable travel policies.</i>	CDT Admin / IGS Coordinator	Steps 6 – 9 should happen as quickly as possible because saved itineraries in the KT portal are subject to price fluctuations between time of saving the quote and actual confirmation of booking.	
Step 7a	Travel insurance booked on behalf of student using information in planned itinerary – if necessary, student is asked to complete travel risk assessment. https://www.ed.ac.uk/staff/business-travel/travel-insurance/insurance-application-form	CDT Admin / IGS Coordinator	This is to ensure that costs will be reimbursed if something happens between the time of booking flights/accommodation and the time of insurance issue.	
Step 7b	If student requires a visa to enter the travel destination, then they should apply for the visa on the basis of the planned itinerary, and before flights are booked.	Student	This is to avoid incurring the costs of flights and accommodation and then finding out a visa can't be obtained or a visa application is denied.	
No bookings should be made until travel insurance (and visa, if applicable) are confirmed				
Step 8	CDT Admin log into KT Online and books the approved itinerary on behalf of the student.	IGS Coordinator logs into KT Online and books the approved itinerary on behalf of the student.	CDT Admin / IGS Coordinator	This requires submission of appropriate budget codes, so make sure these are on hand. If booking accommodation off KT portal (e.g. AirBnB or booking direct with an event organiser) then this can happen now, and subsequently claimed via eExpenses after the trip has concluded.
Step 9	Student takes the trip.		Student	If the student cannot take the trip as expected then costs can only be claimed against the travel insurance under the acceptable terms of that

			insurance. If a student simply chooses not to go on the trip, or misses train/flight etc, they will be expected to reimburse at least 50% of the expenditure under the expectation of <i>Good Stewardship of Public Funds</i> .
Step 10	<p>Student claims any approved trip expenditure (e.g. local travel and subsistence) via eExpenses, submitting all necessary receipts/bank statements and currency conversion information as required.</p> <p><i>See Appendix One for expense policy links and guidance.</i></p>	Student	<p>These expenses should still be within the limit of approved funds.</p> <p>If students are unsure about the finance codes, they should check with the relevant CDT / IGS Administrator first.</p> <p>Expense claims should be submitted as soon as possible and no later than 3 months after the event/purchase, otherwise they may not get reimbursed.</p>
Step 11	Finance administrator checks expense claim and sends a summary PDF to relevant CDT / IGS administrator.	CDT or IGS Finance Administrator	
Step 12	Expense claim is checked against approved spend; budget coding is checked. Information confirmed with CDT / IGD Finance Administrator.	CDT Admin / IGS Coordinator	
Step 13	Expense claim amended / updated (if required) and paid.	CDT or IGS Finance Administrator	

Appendix One – Expense policy and guidance

- University expenses policy - <https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/new-expenses-policy>
- Informatics guide to Expenses - <https://web.inf.ed.ac.uk/infweb/admin/policies/staff-student-expenses-guidance>
- Guidance for using eExpenses -<https://web.inf.ed.ac.uk/infweb/admin/finance/expenses>

UKRI / EPSRC terms and conditions require that all travel expense claims should evidence value for money as the primary consideration. If the preferred travel itinerary is showing at a cheaper price on a flight comparison website (e.g. Sky Scanner, Expedia) then students should contact the Edinburgh Key Travel team to determine if they are able to provide a competitive quote:



Email: edinburgh@keytravel.com



Telephone: 0161 819 8835

Allowable costs: what can be claimed?

- Transportation costs (flights, train tickets, baggage fees, visa fees and local transport). The most economic mode of transportation should be selected in order to be eligible for reimbursement.
- Conference registration fees (early bird fees should be paid when available)
- Meals (reasonable, in relation to the location you are visiting)
- Poster printing, if presenting.

What cannot be claimed?

- Alcohol
- First class tickets
- Any costs associated with personal days added to your trip
- Passport renewal fees
- Any personal items such as travel adapters, personal medicines/toiletries etc.

Receipts

- Students need to keep itemised receipts of all their transactions, i.e. receipts listing each charge separately, not just a total amount.
- Receipts must be original. Therefore, it is simplest to pay separate bills when traveling with peers and academic staff.
- Receipts are required for purchases of any amount, no matter how small.
- Receipts should all be scanned and uploaded to eExpenses (NB: It would be enormously helpful if receipts were ordered in sequential, date order and uploaded as one pdf document).

What restrictions are there are travel and accommodation bookings?

- The most economical accommodation and means of transportation should be used. This is a restriction set by the University as well as the Research Councils.
- Students are expected to share accommodation costs where possible.

Foreign currency transactions

- Students are strongly advised against using foreign cash machines for withdrawing money during a trip. Please exchange money beforehand or use a debit or credit card.
- Students will need to provide proof of the currency exchange rate. Therefore, keep the receipt when exchanging cash, or provide additional acceptable proof of exchange rates as specified in the instructions for completing Expense Claims.

Personal travel

- If students plan to add days for personal travel to their trip or divert their travel to a different destination, this must be noted on the Travel Request Form (TRF) or IGS travel fund application.
- Students can and will only be reimbursed if it is demonstrated that the travel option chosen is less expensive than the travel to and from a location near the event venue, on the day before and the day after the event. Students must provide a screenshot/print-out demonstrating the travel option selected is the same cost or cheaper; otherwise the expense will not be reimbursed.