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Document Type:	Procedure			
Document Name:	Travel Procedure on External Research Grants			
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# Travel Procedure on External Research Grants


## Sponsored Research Office

9<sup>th</sup> November 2022

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## 1. Record of Amendments

This is a record of changes made to this procedure.


Rev.	Date	Document Code	Type of Change	Description of Change
00	09/11/2020	OVPR-SRO-TRAV-PRO-001-001	Initial Release	-

## 2. Purpose & Scope

The purpose of this procedure is to formalize, and aid the researchers in navigating, the travel process on externally funded research grants. This procedure applies to all individuals raising travel requests on External Research Grants.

## 3. Acronyms and Definitions

Abbreviation/Term	Definition
<b>External Research Grants</b>	Refers to research projects, activities and assignments funded partially or wholly by external restricted funding which are carried out by any of HBKU's Home Entities' faculty members and/or researchers
<b>Freelancer</b>	An individual who is hired under specific terms to perform a particular assignment within a project where specialised knowledge of a subject, field or skill is required
<b>FTE</b>	Full-Time Employee
<b>Graduate Student</b>	An individual who is enrolled in either a Masters or PhD Program at HBKU
<b>HBKU</b>	Hamad Bin Khalifa University
<b>HBKU ER</b>	Hamad Bin Khalifa University Employee Relations
<b>Home Entity</b>	A college or a research institute under HBKU
<b>LPI</b>	Lead Principal Investigator
<b>OVPR</b>	Office of the Vice President for Research
<b>Travel Plan</b>	Travel plan as detailed by the LPI in the submitted research plan for an external grant
<b>QF</b>	Qatar Foundation
<b>SRO</b>	Sponsored Research Office – the entity under the HBKU OVPR which oversees administration and management of all externally funded research projects at HBKU, and supports grants funded by OVPR.
<b>SRO E-Portal</b>	A system designed for submitting proposal applications, managing projects and raising requests related to external research projects ( <a href="#">Link</a> )
<b>Undergraduate Student</b>	An individual who is enrolled in a Bachelors Program at HBKU

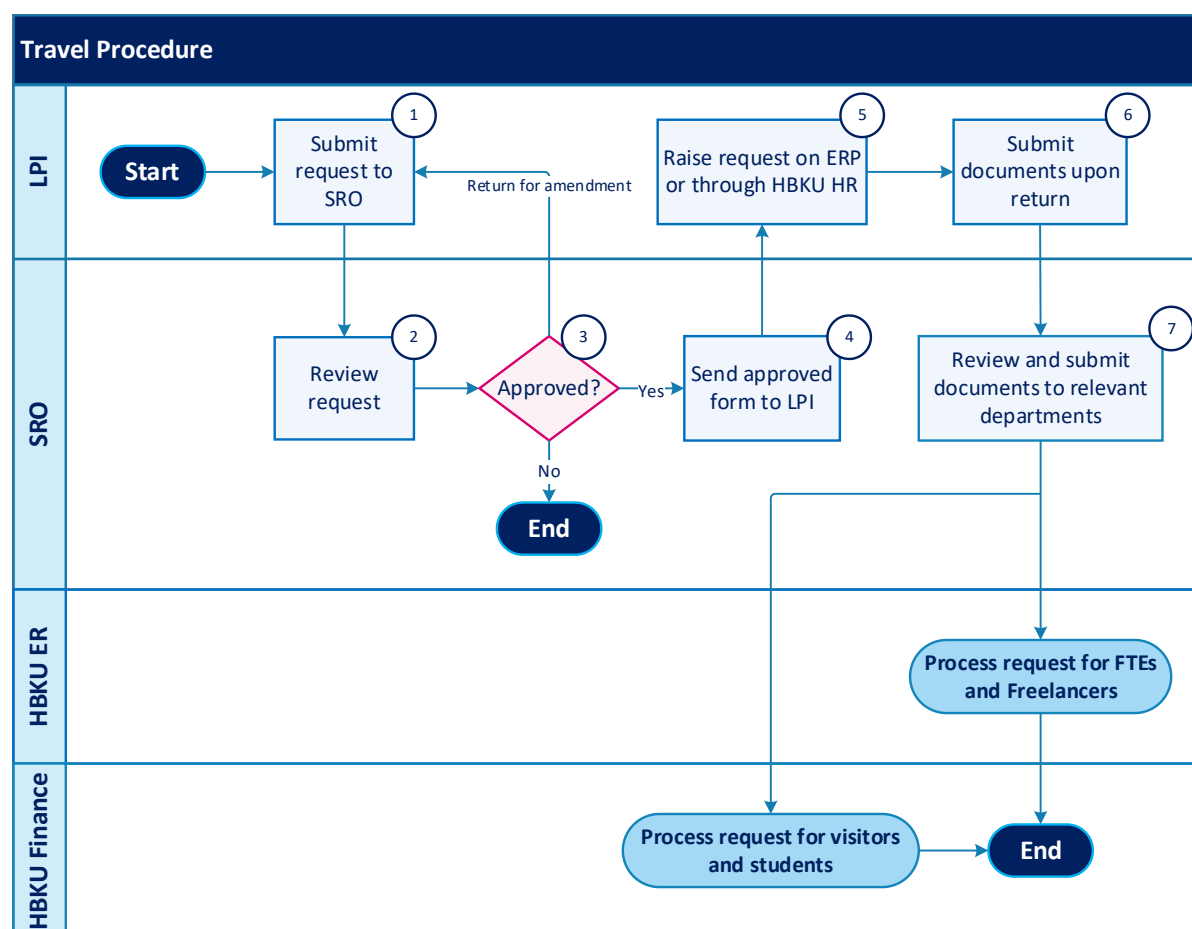
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#### 4. Roles and Responsibilities

Role	Responsibilities
<b>LPI</b>	Initiate travel requests as per the approved Travel Plan, QF Travel Policy, Sponsor Travel Policy, and HBKU policies and procedures; request amendments through change requests when required; and ensure all required travel documents are submitted to SRO upon return.
<b>SRO</b>	Review and approve travel requests as per the approved Travel Plan and budget; and liaise with LPI and other departments at HBKU (HBKU ER and HBKU Finance) to facilitate the overall travel process on External Research Grants.
<b>HBKU Employee Relations</b>	Raise travel requests for freelancers and students; and process reimbursement requests for FTEs and freelancers upon return.
<b>HBKU Finance</b>	Process reimbursement requests for students and visitors upon return.

#### 5. Travel Procedure

##### 5.1 Travel Procedure Flowchart




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## 5.2 Travel Procedure Narrative

Sr. No.	Narrative	Responsible Person/Entity
	<p>LPIs are encouraged to make use of the telecommunication technologies wherever possible. In case, use of such technologies is not feasible, LPIs may raise travel requests for trips authorised under an External Research Grant, which include conferences and meetings.</p> <p>Any travel request must be raised at least <b>one (1) month prior</b> to the travel date and must comply with <a href="#">QF Travel Policy</a>, as well as the Sponsor's Travel Policy.</p>	
1	<p><b>Submit request to SRO</b></p> <p>LPI shall submit <a href="#">Authorisation to Travel Form</a> and all required documents to SRO on behalf of the traveller.</p> <p>The required documents include:</p> <ul style="list-style-type: none"> <li>➤ Name(s) of traveller(s)</li> <li>➤ Destination of travel</li> <li>➤ (Only for freelancers) <a href="#">Business Trip Request Form</a></li> <li>➤ Estimated Ticket Cost/ quotation from QF QA on Economy class</li> <li>➤ Specific documents for Conferences               <ul style="list-style-type: none"> <li>○ Conference dates</li> <li>○ Conference acceptance/invitation letter</li> <li>○ Conference paper or abstract with the Sponsor's support letter</li> <li>○ Conference fees</li> </ul> </li> <li>➤ Specific documents for Meetings               <ul style="list-style-type: none"> <li>○ Meeting dates</li> <li>○ Detailed meeting agenda</li> </ul> </li> </ul>	LPI
2	<p><b>Review request</b></p> <p>Upon receiving the request and required documents, SRO shall review the request against the approved Travel Plan, budget availability and allowability.</p>	SRO
3	<p><b>Approved?</b></p> <p>SRO may either approve the request, reject it, or request LPI to file a change request for any amendments.</p> <p>SRO shall reject the request if :</p> <ul style="list-style-type: none"> <li>➤ the request does not align with the Travel Plan,</li> <li>➤ the budget is insufficient, or</li> <li>➤ the requested travel expense is not allowed by the Sponsor.</li> </ul>	
4	<p><b>Send approved form to LPI</b></p> <p>If the travel request is in-line with the Travel Plan and the allocated budget, SRO shall share the approved budget availability form and approved Authorisation to Travel form with LPI with further instructions on raising the request through appropriate channels.</p>	
5	<p><b>Raise request on ERP or through HBKU ER</b></p> <p>Upon receiving the approved forms, LPI shall submit the approved forms and raise the request using the correct charge account and as per the following:</p> <ul style="list-style-type: none"> <li>➤ If the traveller is FTE, request must be raised through <a href="#">ERP</a>.</li> <li>➤ If the traveller is a freelancer or a (graduate or undergraduate) student, request must be raised through HBKU ER.</li> </ul>	LPI

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	<p>➤ If the traveller is a visitor, they may either request SRO to organise their trip or do so themselves. If a trip is organised by SRO, it shall be subject to the approved Travel Plan and budget availability and allowability.</p> <p><u>Note for visitors:</u> LPI shall ensure that any travel requests for visitors adhere to QF and Sponsor Travel Policy, as well as HBKU's policies and procedures. SRO shall not process any reimbursement requests for visitors who arrive without SRO's prior approval (under Step 3).</p>	
6	<p><b>Submit required documents upon return</b></p> <p>LPI shall submit the following documents to SRO upon the traveller's return:</p> <ul style="list-style-type: none"> <li>➤ Conference attendance letter/completion certificate,</li> <li>➤ Boarding pass,</li> <li>➤ Hotel receipts,</li> <li>➤ Ticket cost receipts,</li> <li>➤ Proof of actual per diem allowance</li> <li>➤ Proof of conference registration fee payment and receipt</li> <li>➤ Conference/meeting report (if needed)</li> </ul> <p>If reimbursement is allowed by the Sponsor, LPI shall additionally submit to SRO the <a href="#">Expense Reimbursement Form</a>, and provide support documents (receipt, payment confirmation, etc.) for each fee he/she needs reimbursed.</p>	
7	<p><b>Review and submit documents to relevant departments</b></p> <p>SRO shall review the documents submitted upon return and approve them subject to budget availability and allowability.</p> <p>Once approved, SRO shall submit the documents to relevant departments at HBKU as per the following:</p> <ul style="list-style-type: none"> <li>➤ If the traveller is FTE or a freelancer, the approved documents shall be submitted to HBKU ER for further processing.</li> <li>➤ If the traveller is a student or a visitor, the approved documents shall be submitted to HBKU Finance for further processing.</li> </ul>	SRO

## 6. Contacts

For further information and queries regarding travel on External Research Grants, please raise a ticket on the SRO E-Portal.

Please visit the following website for HBKU Research and Sponsored Research Office:

- <https://research.hbku.edu.qa/>
- <https://www.hbku.edu.qa/en/research/sro>