

# UBC IZAAK WALTON KILLAM FELLOWSHIPS

## RESEARCH AND TRAVEL ALLOWANCE CLAIM FORM

### INSTRUCTIONS



The UBC Izaak Walton Killam Memorial Fund for Advanced Studies provides current Killam Postdoctoral Fellows and Doctoral Scholars with an allowance to reimburse the costs of research-related travel (attending and/or presenting at academic meetings).

Killam Postdoctoral Research Fellows may also apply the allowance towards the following:

- Relocation costs, incurred to begin fellowships at UBC (one occurrence only)
- Additional research-related expenses

Postdoctoral Fellows are asked to use discretion when claiming non-travel expenses.

All claims are subject to approval by the Faculty of Graduate and Postdoctoral Studies and UBC Financial Services.

FELLOWSHIP	Amount <sup>1</sup>	Types of Expenses		
		Research Travel	Relocation to UBC	Other Research-related Expenses
Doctoral	\$2,000	Eligible	Not Eligible	Not Eligible
Postdoctoral	\$4,000	Eligible	Eligible	With approval from Graduate Studies

<sup>1</sup>Indicates the total value of the allowance over the two-year duration of a fellowship. Only expenses incurred during a fellowship period will be considered, with the exception of expenses incurred by new Postdoctoral Fellows for a one-time relocation to UBC (such relocation receipts may be dated prior to the start date of a fellowship, within reason). Please refer to the Relocation Expenses section below.

### Additional Graduate Student Travel Assistance for Killam Doctoral Scholars

Killam Doctoral Scholars, as current UBC graduate students, may also apply for funding from the **Graduate Student Travel Fund**. The Travel Fund provides one-time travel support to a maximum of \$500 per graduate student, per degree, to present a paper or poster at an official conference or symposium (student workshops and courses are ineligible). Killam Doctoral Scholars should apply for the Killam Allowance before applying for the Graduate Student Travel Fund.

Please note that receipts claimed from one fund may not be reimbursed again from another award.

Students must apply separately for the Graduate Student Travel Fund.

Information is available at <http://www.grad.ubc.ca/awards/graduate-student-travel-fund>, and <https://www.grad.ubc.ca/forms/killam-fellowship-travel-expense-form>.



## Reimbursement Information for all Killam Fellows

- The Killam Allowance will only reimburse expenses that have already been paid by the claimant.
- Killam Fellows are required to submit **original** and **itemized** receipts (each item claimed must be listed on a receipt).
- Receipts must show that the amounts have been **PAID IN FULL**.
- Invoices that do not indicate full payment must be accompanied by a copy of an itemized credit card statement (obscure your card number and unrelated information) or an original debit card receipt.

## Procedures Specific to Expenses

### 1. Research-Related Air Travel

Fellows should seek reimbursement **after** travelling, following the guidelines listed below.

- Complete and submit a Killam Allowance Claim Form (found at the end of this document).
- Provide an **original** boarding pass or a copy of an **e-ticket** with the form. The total amount of the ticket must be displayed and noted as paid in full.
- Submit any relevant supplementary documentation such as proof of conference registration, a conference schedule of events with the claimant listed as a presenter, or a letter outlining the research purpose for the travel.

Fellows who incorporate non-research-related travel with a research trip may only claim the research-related portion of the trip. Fellows are asked to have their travel agent prepare a memo on agency letterhead declaring the cost of the research-related portion of the journey. The memo must be submitted with the application for reimbursement.

### 2. Other Travel Expenses

In accordance with UBC Policy #83 (<http://www.universitycounsel.ubc.ca/policies/policy83.pdf>), the following travel expenses may be submitted for reimbursement:

- Accommodation
- Conference Registration
- Meals with receipts **OR** per diem for meals without receipts to the daily maximum defined at <https://finance.ubc.ca/travel/private/reconcile/private/meal-diems>

Please review Policy #83 for a full list of allowable expenses and related requirements.

The Faculty of Graduate and Postdoctoral Studies reserves the right to restrict expenses reimbursed.

Fellows should seek reimbursement **after** travelling, following the steps listed below.

- Complete and submit a Killam Allowance Claim Form (found at the end of this document).
- Provide **original**, dated, itemized receipts with the form. The total amounts spent must be displayed and noted as paid in full. Receipts that do not indicate that full payment has been made must be accompanied by a credit card statement or other proof of payment.
- Submit any relevant supplementary documentation such as proof of conference registration, a conference schedule of events with the claimant listed as a presenter, or a letter outlining the research purpose for the travel.

### 3. One-time Relocation to UBC for Killam Postdoctoral Research Fellows



The Faculty of Graduate and Postdoctoral Studies offers a reimbursement option for relocation expenses to its new Killam Postdoctoral Research Fellows. Expenses must have been incurred after the date of the fellowship offer and within two months (before or after) of the fellowship start date.

Permitted expenses include travel and removal of household and personal effects. All claims are subject to UBC Policy #82 (Removal and Travel Allowances - <http://www.universitycounsel.ubc.ca/policies/policy82.pdf>) and the approval of the Faculty of Graduate and Postdoctoral Studies.

Steps to seek reimbursement are as follows:

- Complete and submit a Killam Allowance Claim Form (found at the end of this document).
- Provide **original**, dated, itemized receipts with the form (credit card receipts alone are not acceptable). The total amounts spent must be displayed and noted as paid in full. Receipts that do not indicate that full payment has been made must be accompanied by a credit card statement or other proof of payment.

#### 4. Other Research-Related Expenses for Killam Postdoctoral Research Fellows

Small, discretionary expenses may be allowed for minor supplies and consumables required for research studies and presentations. Specialized notebooks, media for data storage, computer equipment (e.g., laptops), and membership fees in professional associations may be considered for reimbursement. Laboratory equipment may not be claimed. Items under warranty which require that the Fellow retain the original receipt may be reimbursed if the receipt has been site stamped by the Killam Assistant.

##### Missing Receipts

UBC has strict guidelines regarding claims submitted without valid receipts. Under special circumstances, small, non-receipted expenses may be submitted for reimbursement on condition that the claimant and supervisor sign an affidavit attesting that the receipt was lost and that the expense will not be claimed through any other source. Please contact the Killam Assistant before submitting a claim for non-receipted expenses.

##### Other Travellers

Expenses incurred by other travellers such as research assistants may be claimed under the Killam Allowance pending approval from the Faculty of Graduate and Postdoctoral Studies. Killam Fellows should make efforts to ensure that reimbursable research-related expenses are incurred under their own name.



## Processing Time

A six- to eight-week turnaround is required by UBC Finance for processing reimbursements once submissions are received by the Faculty of Graduate and Postdoctoral Studies. The reimbursement will be deposited directly into the recipient's bank account.

Please submit by email PDF copy of complete claim package to [killam.fellowships@ubc.ca](mailto:killam.fellowships@ubc.ca) or by mail (must be originals) to:

### Killam Fellowships Program

The Faculty of Graduate and Postdoctoral Studies

The University of British Columbia

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Vancouver BC V6T 1Z2

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E-mail: [killam.fellowships@ubc.ca](mailto:killam.fellowships@ubc.ca)

Web: [www.grad.ubc.ca/awards/killam-fellowship-travel-research-allowance](http://www.grad.ubc.ca/awards/killam-fellowship-travel-research-allowance)