Professional Development Support Funds
Procedures

Revised January 24, 2013

Overview

1. A PDS calendar, forms, and guidelines are posted on the Laney Graduate School website, at http://www.gs.emory.edu/professional_development/pds_funds/index.html

2. Students submit applications to the Laney Graduate School online portal.

3. The graduate school processes applications, decides awards, and notifies everyone concerned, student and program administrator.

4. Programs disburse the awarded support to students. Each program has a designated PDS staff person. Please contact your program administrator first if you have questions.

5. Students report on their PDS awards to the graduate school within 30 days from returning from their conference and or research/training trips.

6. The graduate school reimburses programs once a year. This reimbursement normally takes place in June.

Laney Graduate School Contacts:

Leah Carswell coordinates the process. If you have a question about PDS funds, ask Leah. She will know the answer or know who does.

Ulf Nilsson and Melissa Gilstrap coordinate communication: forms, guidelines, etc.

Cathryn Johnson handles substantive issues about policies.

A PDS Review Committee reviews applications that require competitive review.

Details, details, details…. turn the page
PDS Documents and Website

Please visit the Laney Graduate School website for all the up-to-date documents and forms for PDS.

Website link: http://www.gs.emory.edu/professional_development/pds_funds/index.html

Informational Documents:

- PDS Calendar: contains all due dates and notification dates for the academic year.
- PDS Procedures: this document.
- PDS Expenses and Budget Guidelines: explains what expenses are eligible for PDS funds, and how applicants can document the expense estimates in their applications. (See attachment).

Guidelines: A must read for students.

- Conference Guidelines: states the policies governing conference participation awards.
- Training Guidelines: states the policies governing training awards.
- Research Guidelines: states the policies governing research awards.

Applications: should be submitted online prior to travel and or studies.

- Conference Application Upload Forms: application forms for conference participation awards.
- Comp TandR Application Upload Forms: application forms for training and research support when the student’s cumulative award exceeds $2,500.
- NonComp TandR Application Upload Forms: applications form for training and research support when the student’s cumulative award does not exceed $2,500.

Training and Research Applications:
Note that the application for training and research funds comes in two forms: one to be used when a student’s cumulative awards do not exceed $2,500, and another to be used when a student’s cumulative awards do exceed $2,500. The reason is the difference in review for the two situations. If a student is unclear about whether or not his or her cumulative awards in the category he or she is applying in exceed $2,500, then have the students schedule a time to meet with Leah Carswell during her PDS office hours. PDS office hours are listed on the website.

Reports: should be submitted within 30 days of project/conference completion.

- Training/Research Report: report form for training and research awards

Signatures: It is the student’s responsibility to retrieve signatures from their DGS and Faculty Advisor. If your DGS or Faculty Advisor is unavailable please contact your program administrator. Both Upload 1 Coversheet and Report documents require signatures. Print the completed form and sign. All the Upload forms are word documents. All the forms can be completed electronically and saved.
Step by step process for applying and processing payment for PDS Funds.

Applying for PDS funds:

Before students go on their conference/training/research trip they should have an approved application.

1. Student contacts program about program procedures.
2. Student should read appropriate guidelines for their PDS request. Training, research, and conference guidelines are posted on the LGS PDS website.
3. Student should reference the PDS calendar to check for the most appropriate deadline for their application. Please note that notification dates are listed on the calendar as well.
4. Student determines the appropriate type of PDS request and then downloads the relevant Upload Forms to their computer and completes the forms as instructed. Students should read each Upload Form carefully to ensure that they are submitting a complete application.
5. Student takes completed application/Upload forms to DGS and Advisor to retrieve signatures. GDBBS students are required to obtain a signature from their program administrator in addition to the DGS and advisor signatures.
6. After a student obtains necessary signatures the student then completes the ONLINE application and uploads the Upload Forms to the online portal.
7. Turnaround time for most applications is two weeks from the deadline date, not submission date. Please refer to the PDS Calendar for deadline and notification dates.
8. Decisions are sent via email to the student and designated PDS program admin for each program. If other faculty/staff would like to know the status of a student’s PDS request they should first contact the designated PDS program administrator of their programs. A complete list of each program’s designated PDS program administrator can be found on the PDS webpage.

Note: You do not have to wait for acceptance to attend a training event or a conference before you apply for PDS funds. As soon as you know you are considering a conference, training, or research opportunity that might require PDS funds you should apply. We highly recommend students to submit their PDS request at least two months in advance when possible. Students should also check with their programs in case of additional program procedures.

Payment Procedures for PDS awards:

Student Instructions:
1. Contact your program administrator for program specific details on the payment process.
2. Training and/or research awardees please contact your program administrators as soon as you receive your award notifications for detailed procedures for payment. Final reports are not required for training and/or research until the funded project is complete and within 30 days of completion.
3. Conference awardees please complete the Report form for your conference award. You will need to attach the following documents to your report:
   a. Official Award Notice—this is the email notification you received about your award
      i. If conference award—you will need to attach all your itemized receipts for lodging, travel, registration, and daily expenses. Daily expenses will be reimbursed at the standard rate of up to $25 per day.
      ii. All reports must be signed by your program administrator.
   The report forms are at http://www.gs.emory.edu/professional_development/pds_funds/pds_report.html

Program Administrator Instructions:
1. Program specific procedures: Once you receive a PDS award notice for a student you should send them an email instructing them of the next steps required in order for you to process their awards.
   a. Awards are never processed without an award letter from the LGS.
2. Types of Payment:
   a. Conference awards are reimbursements only and the payments are processed through Compass using your LGS PDS program smartkey.
b. **Research and Training awards** should be processed as advance payments using your LGS PDS program smartkey and job code 9901. Please refrain from processing training and research awards as reimbursements.
   
i. We recommend PAs to process research and training awards within 2 weeks of receiving the award notice, unless an agreement to do otherwise is made between you and the student.

3. **How to record student payments in Compass and HR**- PDS payments in PeopleSoft and/or Compass starting with "PDS Payment for <Type of Award + date of approval>".
   
i. Ex. PDS Payment: Conference 8/15/2011 or PDS Payment: Research Award 8/15/11 or PDS Payment: Training Award 8/15/11.

4. **PDS Report Form**- Once you submit the PDS award payments to HR you will need to take all the original receipts for your records, signoff, and submit to LGS the PDS report and narrative, if applicable.

If you need to confirm your program PDS smartkey please feel free to contact Leah Carswell at lcarswe@emory.edu.

PDS payments should be processed within the same academic year that the students are awarded.
Sample language for response messages to PDS awardees.

Dear Jane Doe,

Congratulations on your recent PDS conference award! Once you return from your conference I will need you to complete the LGS conference report, which can be found on their website, along with the following original itemized receipts:

- Conference Report (Please submit to me before you submit to LGS. I will need to sign off on the form).
- Lodging
- Travel/Flight
- Registration
- Daily expenses will be reimbursed up to $25 per day.

Please note that Emory University policy stipulates that receipts/proof of payment indicates the following:

1. payment method (credit card or personal check, etc.), Credit card receipt must show last 4 digits of the credit card; if you paid by check, you need to provide a copy of the cashed check, or a statement showing transaction.
2. cardholder name,
3. amount, and
4. date of purchase/transaction.

Please submit the documents above to <insert program administrator’s name> by <insert set date> in order for your award to be processed. All PDS awards will be disbursed by direct deposit.

Many Thanks,
<Program Administrator>

Example: GDBBS message to awarded students

“Please complete the Conference Participation Report located at http://www.gs.emory.edu/professional_development/pds_funds/pds_report.html within 10 days of your return and submit to me. Also, enter my name and email address at the bottom of the form for the GPA. Once I receive the completed form I will provide a smartkey to you for your reimbursement. Please remember to complete your reimbursement in Compass within 15 days of your return. Be sure to enter your entire trip expenses that you are eligible for reimbursement from Emory on one request. If you are receiving funds from other sources, let me know and I will provide the steps you need to take to ensure all funding is acquired. You may view our travel policies that are in addition to the LGS’ at www.gdbbs.emory and click on handbook then enter page 32. Let me know if you have any questions.”

If Training/Research:

Dear John Doe:

Congratulations on your recent PDS training/research award! In order to process your award payment, please let me know, as soon as possible, the desired month in which you wish to receive payment. This is very important as I must notify the LGS before the 15th of the month in order to arrange approval. Your award will be processed on <insert date> and will be scheduled for Direct Deposit with <insert payperiod>.

If you have questions or concerns, please feel free to contact <insert program administrator’s name> at <inserts contact information>.
Reimbursement Procedures for PDS Conference Awards

Process conference reimbursements through the Travel and Expense module found in the Compass financial system. Make sure the student has provided Proxy access in order for program admins to process reimbursements.

Navigate: Employee Self-Service > Travel and Expense Center > Expense Report > Create

1. On the Add a New Value tab, click the search icon next to EmplID field.
2. Click the link for the person whose expenses you are entering.
3. Click the “ADD” button. Click Continue.
4. Complete the fields in the General Information section. Under Description: enter the following before you enter your description: “PDS Conference: <XX Enter Conference NameXX>
5. Select a Business Purpose. Typically “Travel - Conference/Seminar”.
6. For travel-related reimbursements, enter the airport code for your Destination.
7. Enter additional information about the Expense Report in the Comment field, such as special arrangements like sharing of Hotel Rooms, or multiple source of funding like GSC or other, etc.
8. Enter the Begin and End dates of travel.
9. Begin to enter Expenses. Select an Expense Type from the drop-down list.
10. Enter the date the transaction began or occurred in the Expense Date field.
11. Enter the amount spent for the expense in the Amount Spent field.
12. The Payment Type defaults to Personal Funds.
13. Click the Detail link. Enter the required information.
14. Click the Accounting Detail link. Enter the LGS graduate program smartkey and review the value in the account field. Click OK.
15. The Expense Detail page redisplays. Click the Return to Expense Report link.
16. If necessary, continue adding additional expenses to the report.
17. Once you have entered all expenses, click the Check for Errors button.
18. Answer the question on Foreign Nationals.
19. Prior to submitting the Expense Report, make sure you review the important notes regarding policies and procedures for creating and submitting expense reports.
20. Scanned receipts must be attached to all expense reports. It is recommended that you scan all of your receipts and save them to a convenient location prior to creating an expense report. You must also attach the PDS award notice.
21. Important: In order to attach receipts and documentation, you must first save the expense report by clicking the Save button.
22. Click the Save button.
23. Click the Add Attachment button. Click the Browse button to locate the scanned receipt. Click Open or Save, depending on your computer’s operating system.
24. Click the Upload button. Click the Save button.
25. To submit the Expense Report into Workflow, click the Submit button.

See next page for procedures for Training and Research awards
Training and Research 9901 Payments

Process research and training payments through HRWeb Student Hire. Please use Job Code 9901 (Training Fellow) and PayGroup N00. The sub-code, formerly 7210 (or 7211) is no longer required.

Very important: Please enter as the START Date, the 1st of the month (This is the month of payment) AND the 1st of the following month as the END date.

Example for student to receive Payment in MAY: Job Start Date = 5/1/2011 & Job End Date = 6/1/2011.

If you don’t enter the payment as STARTING on the 1st of one month and ENDING on the 1st of the following month, the payment will be prorated, and the student will not receive the full amount.

Also important: Input the Laney Graduate program Dept id in the ‘Department’ field (86X XXX) And in the ‘Primary Department’ field. Otherwise, this will not route appropriately, and thus will not get approved for payment.

Also, setup the compensation rate to equal the total amount of the PDS Research/Training award. For example, if the PDS Research/Training award is for $2,000, the Compensation Rate will = $2,000.

Please be advised that Federal taxes may be withheld from PDS awards for international students who are not exempt on the basis of an applicable tax treaty. All international students must meet with the tax specialist in the controller’s office when they arrive, as the Office of the Controller offers valuable assistance on navigating the rules and regulations associated with their international status, including the impact of their home country’s tax treaty, or lack thereof.
Details Details Details....

**Deadlines:** Submit your application using the online portal before you travel. As soon as you consider attending a conference you should submit.
- Research and training are not, in general, approved retroactively. If students plan to participate in a conference and/or research/training over the summer they should submit a PDS request before the last deadline of the PDS calendar year.
- Conference travel must be approved in the same academic year that the conference takes place. The last conference deadline of the academic year is in July, so if you need reimbursement for a conference, be sure to submit your application by this date.
- PDS calendar year is from September to September.

**Report Submissions:** reports are not submitted electronically as of yet. All reports should be submitted to the front desk in room 209 of the Administration Building. The receptionist will receive the reports and stamp them with the date. Do not place any reports in Leah Carswell’s mailbox without having the LGS receptionist date stamp your report.

**One package:** All application items – forms, supporting documents, etc. – must to be submitted as one package at the same time.

**Incomplete Applications:** Applications with missing items will be denied approval. The student will be required to resubmit at the next deadline.

**Program Copies:** Program administrators will receive an electronic copy of the students application once the student submits their application to the online portal. We will not copy applications and return them to the programs.

**Eligible Expenses:** Applicants should review the Expenses and Budget Guidelines document to learn what kinds of expenses can be paid for using PDS funds.

**Research/Training Project Changes:** Program administrators are only to pay students for LGS approved projects. If a student’s project changes from the proposed project submitted with their PDS request then student is required to notify Leah Carswell at lcarswe@emory.edu. Based on the changes of the project the student will be advised on how to proceed.

**Turn-around:** We are committed to completing the review of each batch of applications by the stated notification date. Please help us by submitting complete and easy-to-read applications.

**Notification for Everyone:** By the stated notification date, we will notify everyone concerned using an email-merge process that sends a notification email to the applicant, and the program admin(s). This means that program admins will receive one email for each application from their program. There will be no paper notifications. The emails are it. If you want paper copies for you records, just print the emails.

**Award payment procedures:** All awarded funds are disbursed by programs, following their usual procedures and applicable university policies.

**Payment Timeline:** All payments should be disbursed in the same academic year during which they were awarded.

**Award Amounts:** The notifications sent to applicants and program admins will include the amount of funds actually awarded to an applicant, which may be different from the amount a student applied for. The amount in the notification email is the amount the Graduate School will provide. Any funds disbursed in excess of that will need to come from different sources. There is one exception.
Student Reports and Reimbursements: Our reimbursements to programs will be based on the student reports, signed by program admins, we have in hand. Each reimbursement cycle will add up the amounts in the student reports received since the previous cycle.

Disbursed Amount and Reimbursements: The amount disbursed to the student should almost always equal the amount awarded. However, there are cases where discrepancies may exist. Depending on the nature of the discrepancy and the award, these will be handled differently:

a. If the amount disbursed to a student is less than the amount awarded, the student should indicate the amount reimbursed in their final report. Once the student’s final report is received within the LGS office we will make the award adjustment in our database.

b. If the amount disbursed to a student exceeds the amount awarded, students should email Leah Carswell at lcarswe@emory.edu to schedule a time during her PDS office hours for award adjustments. If the request is approved, we notify the student and the program admin, and adjust the student’s PDS records accordingly. Students and/or Program admins should attach the revised award email to the students report.

Advances: Process research and training payments through HRWeb Student Hire. The job code is 9901 (Training Fellow), and place the letter “N” before all 6 digit department and primary department numbers. Very important: please put the 1st of the month for the start date. Then, enter the 1st of the FOLLOWING month for the end date. If you don’t enter the 1st of the following month the payment will be prorated. For training or research awards, we will only reimburse the program up to the amount awarded.

Tuition payments to another institution: Try to retrieve an invoice and process through Emory’s payment request. The payment request is on the finance web page at HUwww.finance.emory.eduUH. Another payment form would be the P-card. The amount can’t go over the threshold of $1,499.99; if it does, you will have to contact Tascha Short (tascha.short@emory.edu) for a one-time approval.

Reimbursement Dates: We will reimburse programs once a year, typically during the month of June.

PDS Questions or Concerns?
Please contact Leah Carswell at lcarswe@emory.edu.