

TRAVEL POLICIES AND PROCEDURES FOR U.S.-BASED TRAINEES

Please Note: by clicking on the links in this text (e.g. “Travel Registry”) you will be taken to the appropriate page in this document, or to an external website

I. In order to obtain permission to travel, students must register the following information in the BHEARD TerraDotta [Travel Registry](#):

- Departure and return dates
- Specific destination for travel
- Reason for travel (personal, conference, or research)
- Brief description of travel
- Type of travel (domestic or international)
- Whether or not you will need BHEARD funding
- Whether or not you will be using external funding
- Whether or not you will be holding an assistantship during the time of travel
- Previous DS-2019 travel validations
- Supporting information or documents (if applicable)

II. Review of requests by BHEARD:

- **Requests must be submitted at least 30 days before your expected departure.**
 - Even if travel was mentioned in conversation, by phone, or in another document (such as the “Degree Completion Plan”) you must still submit a travel request within TerraDotta.
- **BHEARD will review requests within two weeks**, provided all necessary documentation has been submitted.
- **If all requirements are met, the Travel Request status will be changed to “Approved” and the TerraDotta system will send an automated email to the student regarding the status change.**

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GENERAL RULES:

- I. **BHEARD approval via TerraDotta does not constitute sole approval to travel.**
 - You must follow the policies and procedures of your university, including making sure your advisor is aware of and approves your travel.

- II. **Tickets should not be purchased until travel has been approved.**

- III. **Your DS-2019 should not be shipped until travel has been approved and/or you have been instructed to do so by BHEARD.**
 - If your DS-2019 was validated within the last year (inclusive of your return date) it does not need to be validated again.

- IV. **For travel approval to occur:**
 - Current Semester Evaluations must be submitted.
 - For research travel, Degree Completion Plan must also be up-to-date.
 - Students must be in good standing and making satisfactory academic and program progress.

DOMESTIC TRAVEL (WITHIN U.S.)

I. PERSONAL

Description: This includes using your own funds for visiting family in another state, traveling with friends, etc. Please note that USAID and BHEARD expect you to “be engaged in program-related activities on a full-time basis” – this includes, but is not limited to, your research assistantship duties.

Time Limit: 15 U.S. business days (counted Monday-Friday)

Exceptions to Time Limit:

- Scheduled university breaks (e.g. Spring Break)
- University-observed holidays (e.g. Thanksgiving)
- Other exceptions will be handled on a case-by-case basis

Funding: Personal

Additional Documentation Required: Email confirmation from advisor.

Other Notes: Students may keep their assistantships during this travel; however, any missed assistantship duties must be made up.

II. CONFERENCE

Description: Attendance at or participation in a conference, workshop, training, etc. that would be beneficial to your academic or professional development under the BHEARD program.

Time Limit: N/A

Funding:

- BHEARD Conference Allowance **AND/OR**
- External

Additional Documentation Required:

- Student Justification
- Advisor Letter of Support
- Budget (if using BHEARD Conference Allowance)
- Other (copy of abstract or presentation, invitation letter, etc.)

INTERNATIONAL TRAVEL (OUTSIDE OF U.S.)

I. PERSONAL

Description: This includes using your own funds for visiting family at home, etc. Please note that USAID and BHEARD expect you to “be engaged in program-related activities on a full-time basis” – this includes, but is not limited to, your research assistantship duties.

Time Limit: 15 U.S. business days (counted Monday-Friday, or Sunday-Thursday for Muslim countries)

Exceptions to Time Limit:

- Scheduled U.S. university breaks (e.g. Spring Break)
- University-observed U.S. holidays (e.g. Thanksgiving)
- Personal travel combined with research travel (see [FAQ #4](#))
- Other exceptions will be handled on a case-by-case basis; exceptions will not be made for days of travel, local (in-country) holidays, etc.

Funding: Personal

Additional Documentation Required:

- Student Justification
- Advisor Support Letter

Other Notes:

- Students may keep their assistantships during this travel; however, any missed assistantship duties must be made up.
- [DS-2019 validation](#) may be required.
- [Visa renewal](#) may be required.

II. RESEARCH (DURING COURSEWORK)

Description: This includes the BHEARD-funded Pre-Dissertation Trip, or using personal or other funds from your advisor, department, or another external source to participate in preliminary research, meetings, pilot projects, technical training, etc. that are relevant and directly applicable to your BHEARD program.

Time Limit: Up to one semester (e.g. Summer term)

Exceptions to Time Limit: Exceptions will be handled on a case-by-case basis.

Funding:

- Personal **AND/OR**
- BHEARD Round-Trip Ticket (Pre-Dissertation) **AND/OR**
- BHEARD Thesis Research Allowance **AND/OR**
- External

Additional Documentation Required:

- Student Justification
- Dissertation Proposal (draft or committee-approved version)
- Advisor Letter of Support
- Research Plan
- Budget (if using any of your BHEARD Thesis Research Allowance)

Other Notes:

- Students may keep their assistantships during these research trips, **except** if travel will occur for the entire semester before the student is slotted to return home for final research
- [DS-2019 validation](#) may be required.
- [Visa renewal](#) may be required.

III. RESEARCH (AFTER COMPLETION OF COURSEWORK)

Description: This refers to the final home research period. At the end of your coursework in the U.S. (which is up to three years for PhD students), you will return to your home country to undertake your research, followed by the writing up and defense of your dissertation.

Time Limit: Up to 12 months

Exceptions to Time Limit:

- Students who complete coursework and other university requirements early are expected to return home, and may add that remaining time to their research period¹
- Other exceptions will be handled on a case-by-case basis.

Funding:

- BHEARD One-Way Ticket (Final Research) **AND/OR**
- BHEARD Thesis Research Allowance **AND/OR**
- External

Additional Documentation Required:

- Student Justification
- Dissertation Proposal (final version)
- Advisor Letter of Support
- Research Plan
- Budget (if using any of your BHEARD Thesis Research Allowance)

Other Notes:

- Students will be required to fill out the following questionnaires in their **Research Application**² in TerraDotta:
 - Home Research Credits
 - Bank Information (Home Country and Host Country)
 - Final Dissertation Proposal Documents
 - Study Leave Pay
 - W-8 BEN Form
 - Home Health Insurance
- Students will **not** be permitted to return to the U.S. after returning home
- Further instructions for U.S. students returning home for final research can be found [in this document on pages 14-16](#)

¹ For example, if your U.S. program end date was August 2016, but you were ready to go home in May 2016, you would still have until August 2017 to complete your home research.

² Additional instructions on the Research Application questionnaires will be provided in a separate document, for students who are preparing to make their final return home.

FUNDING REFERENCE

These refer to the following questions on the Travel Registry questionnaire:

4. Will you be using any BHEARD Funding? (Yes or No)

5. If you are using any BHEARD Funding, please select all that apply:

- **Conference Allowance**
 - These are the “Conference Fees to Professional/Student Societies” and “Travel/Attendance to Professional Meetings” items in your university’s subcontract; please refer to your university’s financial representatives for more information
- **Thesis Research Allowance**
 - Please refer to your university’s financial representatives for more information on the amount of this allowance as listed in their BHEARD subcontract
- **Round Trip Ticket (Pre-Dissertation)**
- **One Way Ticket (Final Research)**
- **Not Applicable**
 - Please select this option if travel will only be personally- and/or externally-funded

8. Will you be using any external funding?

- This includes funding from any other source except BHEARD or personal funds
- If yes, please list the source and amount of funding (e.g. \$5000 from advisor, or \$10,000 from NSF grant)

DOCUMENTATION REFERENCE

I. Student Justification (Personal, Conference and Research Travel)

- **Please provide a brief explanation of the following:**
 - Why you will be taking this trip
 - What you will be doing on this trip (such as presenting a poster at a conference)
 - How it will relate to and enrich your academic program and your BHEARD experience
- **If traveling internationally, this information should be uploaded as a letter (Word or PDF) and include the dates of departure and return.**

II. Dissertation Proposal (Research Travel)

- **For research travel**, students must upload a copy of the dissertation proposal. This can be a draft or summary if the proposal has not yet been approved by your graduate committee.
- **Students returning home for final research** must also add their committee-approved proposal to the “Final Dissertation Proposal Documents” questionnaire in TerraDotta.

III. Advisor Letter of Support (Conference or Research Travel)

- **For conference travel**, this letter should explain that your advisor approves of the travel, and how this would be a good professional and/or academic opportunity for you.
- **For pre-dissertation or other research travel during coursework**, this letter should explain that your advisor approves of the travel, and that your obligations as a research assistant will be met during your trip.
- **For final research travel**, this letter should explain that your advisor feels you are ready to return home for final research, and that you have completed all the coursework and university requirements³ for your degree (aside from dissertation research, writing and defense).
- **If traveling internationally, this letter must also include the following:**
 1. The purpose of your visit
 2. That this is a short-term visit
 3. Dates of departure and return
 4. That you will return to campus before the beginning of classes (start of semester)
 5. That you are a student in good standing at your U.S. university

³ This include things like passing your qualifying/comprehensive exams, defending your research proposal, IRB clearance (if researching human subjects), etc.

IV. Research Plan (Research Travel)

- For research travel lasting 30 days or less, this must include a **daily** timeline of your research activities.
- For research travel lasting between 30 days and one semester, this must include a **weekly** timeline of your research activities.
- For final home research (lasting more than one semester), this must include a **monthly** timeline of your research activities; this should also be uploaded in the “Final Dissertation Proposal Documents” questionnaire in TerraDotta.

V. Budget (Conference or Research Travel)

- For BHEARD-funded conference travel, this should include items such as airfare, conference registration fees, housing, meals, etc.
- For BHEARD-funded research travel, this should include a breakdown of how your thesis research allowance will be spent (if applicable). It does **not** need to include the pre-dissertation round-trip ticket or per diem (if applicable).
- Students returning home for final research must also add their final research budget to the “Final Dissertation Proposal Documents” questionnaire in TerraDotta.
- If any external funding will be using **in addition** to BHEARD funding, please include in your budget.

VI. Other

- This is space for additional supporting documentation, such as invitation letters, conference abstracts, etc.

DS-2019 Shipment Instructions

Your DS-2019 must be validated by USAID-Washington to allow for reentry to the U.S.⁴

- The required support letters will be printed from your Travel Registry questionnaire.
- **Once your travel has been approved in TerraDotta**, please ship your original DS-2019 via FedEx or DHL (not by standard mail) the BHEARD Office.

BHEARD Program
446 West Circle Drive, Room 408
Morrill Hall of Agriculture, Michigan State University
East Lansing, MI 48824
Phone: +1-517-353-2127

- You are responsible for the cost of this shipment.
- The DS-2019 will be shipped back to your current home address as listed in TerraDotta, **unless otherwise specified**.
- Validations are handled by USAID-Washington, and it may take up to 2 weeks for your signed DS-2019 to be returned back to you – **please plan accordingly**.

Passport Renewal Instructions

You are responsible for keeping your passport valid at all times.

- A valid passport must be on file in TerraDotta; students without valid passports on file will not have travel approved.
- Passport renewal can be done from within the U.S., or in your home country.
 - For renewal within the U.S., you are responsible for contacting your nearest home country embassy ([link](#)).

Visa Renewal Instructions

If your visa will expire before your departure, or while you are out of the country, you must make arrangements to renew it while traveling; you cannot reenter the U.S. on an expired visa.

- **A renewal *interview* cannot be attended within the U.S.**
 - You may **start** the scheduling process from within the U.S. (e.g. fill the DS-160 form, etc.), but the interview appointment can only take place at a foreign U.S. embassy.
- **You are responsible for planning your renewal appointment⁵.**
 - As this is sometimes a **lengthy** process, please begin this process before departure, and schedule your interview for **EARLY** in your trip home.
 - You will need to schedule an appointment at the nearest **U.S. Embassy** ([link](#)) to have the visa updated
 - Instructions on how to arrange a visa renewal appointment can often be found in the “**non-immigrant visa**” section of the U.S. Embassy webpage for your country
 - You can check the U.S. Bureau of Consular Affairs website ([link](#)) to see the wait time for appointments and for printed visas.

⁴ Previous travel validations are good for one year, inclusive of travel return date.

⁵ USAID-sponsored J-1 students are **not** required to pay visa application fees; however, if you are charged these fees for your visa appointment, please send your receipts to BHEARD@anr.msu.edu for reimbursement by the BHEARD Financial Office.

FREQUENTLY ASKED QUESTIONS

1. Who is responsible for making my travel arrangements?

The round-trip ticket and *per diem* for the pre-dissertation trip, and the one-way ticket and return baggage allowance for final research, are all listed in your U.S. university's subcontract and should be handled by your university. If approved for personal travel, you would be responsible for your own travel arrangements.

2. What if I purchased my tickets before BHEARD approved my travel?

If your travel was not approved, resulting in you needing to change your travel dates, you will be responsible for any fees incurred for changing travel as a result of purchasing travel tickets before obtaining BHEARD approval.

3. What happens if I miss a flight, or something else interferes with my travel plans?

If your travel was arranged through your university according to the subcontract, please check with the appropriate office/personnel at your university what they expect from you in situations like these. If disruptions to your travel schedule are your fault (e.g. you were late to the airport), you would be responsible for making alternate arrangements and covering any costs incurred.

For MSU students, or students whose travel is booked directly by the BHEARD office: If disruptions to your travel schedule are your fault (e.g. you were late to the airport), you would be responsible for making alternate arrangements and covering any costs incurred. For travel disruptions outside of your control (e.g. weather delays, canceled flights) you may contact the BHEARD Office for assistance.

All students should make sure their emergency contact information (both U.S. campus and home) is up- to-date in TerraDotta.

4. Can I combine my pre-dissertation trip with a visit to my family?

Yes – since BHEARD pays for the roundtrip ticket for the pre-dissertation trip, many students choose to also visit family during this time. However, you must ensure that you follow both the regulations for [personal travel](#) and the [research travel](#) regulations. **Your research plan must clearly differentiate between the time spent on research preparations vs. time for personal vacation.**

5. Do I have to take my pre-dissertation trip between Years 2 and 3 of my coursework?

No. As long as you meet the requirements listed, you can take this trip earlier.

6. Can I use my dissertation allowance early (such as during the pre-dissertation trip)?

Yes, if you include a budget for how the allowance will be used. Remember, this allowance is only provided once, and if used up early then there will be no additional funds provided by BHEARD.

7. Can I return to the U.S. after I've returned home for final research?

No, students will not be permitted to return to the U.S. for research, analysis, writing, and/or dissertation defense - the BHEARD program intends for these activities to be done from the student's home country during the final home research period. Students must follow the requirements for final research before being approved to return home, including meeting all coursework and other requirements for the degree aside from the dissertation.

Any exceptions to this rule will be handled on a case-by-case basis by the BHEARD Office.

8. Do I need to tell BHEARD when my advisor plans on visiting me in my home country?

Yes, please do! There will be a question in your TerraDotta **Degree Completion Plan** for you to note when your advisor plans to visit your home country. When the trip is actually planned, please make sure you note this in your **Travel Request (question 11)**; your advisor will then be sent a **Google Survey** link to fill out information about the travel.

I. In Preparation to Return Home (U.S. Trainees):

General Rules

- USAID regulations **require** you to travel back in your home country by the end date listed on your DS-2019 (Box 3), unless your end date has been otherwise modified in Trainet by the BHEARD Office. *You must verify your return no more than 3 days after your end date.*
- If you have passed your preliminary/comprehensive/qualifying exams and successfully defended your dissertation proposal prior to beginning your last academic term in the U.S., BHEARD **may** require you to return to your home country earlier than your listed end date.
- **All** U.S. campus and program requirements must be met prior to departure, except for final analysis, writing, dissertation defense, and dissertation submission.
 - Final analysis, writing, and dissertation defense must take place in your home country.
- **All** U.S. financial obligations must be met prior to departure.
 - This includes apartment lease, utility bills, university bills, etc.
- PhD students are allotted **up to 12 months** to complete home country research.
 - In most cases, this will be 12 months from your program end date (listed on your DS-2019).
 - Students who depart the U.S. earlier than their listed end date can add that time to their home research period (i.e. if you leave the U.S. 3 months early, you would have up to 15 months to complete your home research period).

Questionnaires to Submit in TerraDotta

These questionnaires must be submitted at least 2 weeks in advance of your departure from the U.S. to avoid a delay in payment of your thesis research allowance, home living allowance, etc.

Travel Registry

- Final Travel Request**

Research Application

- Home Health Insurance**
- Home Research Credits**
- Bank Information* (Host Country and Home Country)**
- Final Dissertation Proposal Documents**
 - Expected Date of Departure
 - Proposal
 - Budget
 - Timeline
 - Expected Date of Defense
- Study Leave Pay⁶**

⁶ If you will not be receiving paid study leave from your home institution, you will be required to sign a letter provided by the BHEARD Financial Office which will detail the amount, duration, and handling of a BHEARD-provided "home living allowance."

II. During Your Home Research Period:

General Rules

- **USAID does not require you to be enrolled in health insurance while home for research.** If, however, you would like to be enrolled in health insurance, you will need to find a locally-appropriate insurance policy.
 - If you choose to be enrolled in a local policy, the policy will need to be reviewed and approved by BHEARD before you enroll yourself. You will be responsible for the premium (cost to enroll), but can submit a receipt to BHEARD for reimbursement. *As a reminder, USAID/BHEARD cannot cover any medical expenses aside from the insurance premium.*
- **You are responsible for making appropriate arrangements for your dissertation defense.**
 - If you are unable to locate a suitable venue or have other issues, please inform the BHEARD Office.
- **Your final written dissertation must include the following acknowledgment:**

“This material is based upon work supported by the United States Agency for International Development, as part of the Feed the Future initiative, under the CGIAR Fund, award number BFS-G-11-00002, and the predecessor fund the Food Security and Crisis Mitigation II grant, award number EEM-G-00-04-00013.”
- As a reminder, you must fulfill the **two-year home residency requirement** of your USAID-sponsored J-1 visa, as detailed in the USAID Conditions of Sponsorship form.
 - The two years start counting once you have made your one-way return to your home country from the U.S.

Questionnaires to Submit in TerraDotta

- In approximately May and December of each year, you will be asked to fill out an **evaluation questionnaire**, so that you can report on how your research and dissertation are progressing.
- If applicable, upload **health insurance** policy documents for review; if approved, upload proof of health insurance coverage and receipt for reimbursement of insurance premium.

III. Upon Completion of Your Home Research Period:

General Rules

- Upon receipt and review of the questionnaires and survey below, your post-completion grant will be disbursed (by your U.S. university), and you will be finished with the BHEARD program.
- We would appreciate your participation in any additional **alumni monitoring activities** of the BHEARD Program or of USAID.

Questionnaires to Submit in TerraDotta

Research Application

- **Final Degree Program Documents**
 - Final defended dissertation
 - Final degree certificate (once available)
 - Final transcript (once available)
- **Post-Completion Grant**
 - Proposal

- Budget
- Final Research Evaluation**
- Exit Survey**

Survey to Complete in SurveyMonkey

- Follow-Up Monitoring Survey of U.S. BHEARD Trainees**