Professional Development Support Funds Handbook
AY2023-2024

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Introduction

Welcome to the **AY2023-24** Professional Development Support Funds Handbook. This Handbook exists to help Laney Graduate School PhD students navigate the PDS application processes for conference, research, and training PDS funding requests.

If you are intending to apply for PDS funding, please make sure to consult the current academic year's version of the PDS Handbook (always use the website version, do not download an older version).

Current version of the PDS Handbook: v1.2, updated 10/1/2023

PDS applications are important in doctoral education for several reasons:
1. They aim to help students prepare to apply for funding from external agencies. In other words, this is to help students practice writing a funding application for other external funding agencies.
2. They aim to help students (a) acquire training pertinent to their degree not offered at Emory University, (b) conduct research for their dissertations and research projects, and (c) network and present at conferences.

UPDATES FOR AY2023-24

Application Start Date: For AY2023-24, the PDS application is projected to start receiving applications starting Sept. 1, 2023. Before this date, you will not be able to submit any applications.

New Online Application System: Starting this year, students will apply for PDS funds through a new online system and submit the PDS Report through this new system (please visit the PDS webpage for the latest information). For applications approved in the prior year, the PDS Report should still be submitted by last year's method. For new approved applications, the PDS Report will be submitted through the new online system.

Application Priority: Applications will be funded according to priority and allocated budget for each PDS cycle. The priority list for each program is displayed in the section below. Please consult the list before deciding to apply. We highly recommend that students at the lowest priority years reconsider before submitting their applications or incurring any expenses in advance.

Application Timeline: For 2023-24, students may now either (1) apply before the start of the event or (2) apply after the event has concluded. Funds are not guaranteed in all circumstances, however, so please do not incur any costs unless you are able to cover the full cost of the conference/training/research activity in cases where you may receive no funding or partial funding. If you are applying for an event that has already concluded, it must have taken place from 9/1/23 – 8/31/24.

Preliminary Information

Total Funding Eligibility

Applicants are eligible to be approved for the following (visit the FAQ section for details):

- Three categories of their own lifetime eligibilities: up to $2,500 conference funding; up to $2,500 non-competitive training funding; up to $2,500 non-competitive research funding. Successful competitive training or research applications automatically subsume all remaining non-competitive lifetime eligibility for the training or research category. There is no competitive conference funding.
- Up to $5,000 total eligibility for non-competitive and competitive training/research funding. Beyond this point, the student must always apply for competitive training/research funding.
- Up to $8,000 lifetime research and training funding in any combination of competitive and non-competitive funds.

Taxes (International Students)

International student's PDS funding may be subject to tax withholdings, depending on the nature of their home country's tax treaty for **all** PDS Conference, Training, and Research funds. These are withholdings that follow international tax laws and therefore PDS has no control over this process. PDS will not cover any taxes withheld for PDS funds and therefore students may not calculate additional taxes for their applications. If you have questions about the tax implications, you should contact Emory's tax office.

- The tax treatment of scholarships, subsidies, fellowships, grants, awards, or stipends may vary for each student. Students should consult the IRS for information about taxes. Emory University does not offer personal tax advice. Instead, Emory University recommends seeking professional tax counsel whenever necessary.

General Funding and Disbursement

All funds are disbursed directly to the student. PDS will not pay labs, the student's PI, or any other advisor. The student's graduate program administrator or designated staff member can assist the student in releasing the funds to the student once they have been approved for funding. After the application has been approved, please check with the graduate program administrator (PA), or another designated staff member responsible for processing PDS funds, regarding the disbursement of funds. LGS Finance will not provide Speedtypes.

Laney Graduate School PhD students are *eligible* for PDS funds provided for by generous donations to LGS, but the funds should not be viewed as guaranteed regardless of the circumstances. No PDS fund belongs to any individual student's account or exists as a balance for any specific student. Each applicant is *eligible* to be approved up to the various limits for the PDS funding categories listed above. Funds will be disbursed on a quarterly award model to ensure that funds are allocated and available throughout the entire year. If requests are greater than the amount available in each quarter, requests may be awarded, partially awarded, or declined based on a priority model.

For most programs, the priority is by seniority (5+, 4, 3, 2, 1), though some programs have elected to use a different yearly priority. We cannot guarantee any funding awards, but we estimate that students in the top two priority years are more likely to receive 100% of their requests, the third priority year may receive a partial request, and the fourth and fifth priority years may receive partial funding or be declined.

The priority list by program is as follows:

The default prioritization (from highest to lowest) is in order of seniority: 5+, 4, 3, 2, 1. The following programs have elected to use alternate prioritization:

- Economics: 3, 4, 5+, 2, 1 (All applications)
- English: 2, 3, 4, 5+, 1 (Conference); 4, 3, 1, 5+, 2 (Research/Training)
- Epidemiology: 4, 3, 2, 1, 5+ (All applications)
- History: 1, 2, 3, 4, 5+ (Research/Training)
- Religion: 3, 4, 5+, 2, 1 (All applications)

We highly recommend that students in the lowest priority year(s) reconsider before submitting their applications or incurring any expenses in advance. While we cannot predict how much funding students will request during each quarter, it is likely that students in the lowest two priority years will receive partial or no funding.

Travel

International Travel

All students who participate in international travel for training and research must register with ISOS. If you find yourself in an emergency, which includes being a victim of a crime, you should immediately contact ISOS for assistance. Please note, however, that ISOS is not travel insurance and neither ISOS nor PDS will reimburse you for personal property that is affected by any travel conditions or incidents.

For 2023-24 (travelling internationally):

- Students must have the International Travel Form submitted and approved prior to approval of PDS funds. This is separate from the PDS application process: please visit the PDS homepage for details. A delay in submitting and receiving approval for this Form may result in a delay of your PDS application. For supplemental health insurance (if desired), please see the FAQ section of this Handbook.

Flights funded by PDS

Airfare must be purchased through Emory Travel CTM or Maupin/Sequel if requesting PDS funds for flights.
IMPORTANT INFORMATION REGARDING CTM: For travelers who have never booked travel through Emory Travel (CTM) or have not booked since the start of the COVID-19 pandemic, the person must contact travel@emory.edu prior to gaining access to their travel profile on CTM. Each traveler is verified through the Emory system and once verified, Emory Travel will work to activate/re-activate the profile and the student will receive instructions on how to log-in to their profile on CTM.

If you have never booked travel through CTM or have not booked since the start of the COVID-19 pandemic, do not attempt to log-in until you receive confirmation from Emory Travel.

If the student is unable to access CTM, they should use Maupin Travel.
Emory Travel website: https://finance.emory.edu/home/travel/index.html

- In some cases, it may be desirable to purchase flights prior to approval for PDS funding. PDS will accept pre-purchased flights as the flight expense documentation, with the implicit acknowledgment from the student that they have not yet been approved for any funds. This policy also extends to other time-sensitive costs, such as lodging that must sometimes be booked, and paid for, in advance. Do not purchase the flight in advance or incur other costs if you are unable to cover the full cost in cases where you do not receive any PDS funding.
- Since flight prices fluctuate regularly, it is the applicant's responsibility to apply in a timely manner and purchase flights according to the originally stated budget (in advance, if necessary). Once a student has been approved for funding, there may be no updates made to the original budget.

Mileage vs. Flights

If a student elects to drive (longer than 4 hours one-way) instead of flying, they must include the following information with their mileage documentation:
1. Normal mileage documentation
2. What the flight would cost for the same days of travel

PDS will fund whichever is the lesser amount of the two costs. For example:
- If electing to drive from Emory University to Vanderbilt University (~500 miles round trip):
  - Mileage would cost: 500 miles * $0.655/mile = $327.50
  - Flight averages: $150-250

The student may request up to the current flight cost amount if electing to drive and submitting mileage costs.

Flight Documentation

If you are submitting a dummy booking or a flight receipt from Emory Travel as part of your flight documentation, it must show the following: (1) departure/arrival airports and (2) the exact dates of travel.

Professional Development Supports Funds 2023-24 Calendar

Please coordinate any external deadlines with the PDS deadlines and pay close attention to the deadline dates and notification dates when preparing your application. Students are not required to already be accepted into conferences, training activities, or research archives before applying, so students should apply as early as possible. Applicants may always decline the PDS funds after they are approved.

Type of Application	Application Deadlines	Notification Dates
Conference	September 15	November 1
	December 15[1]	February 1
	March 15	May 1
	June 15[2, 3]	August 1

Type of Application	Application Deadlines	Notification Dates
Training and Research Non-competitive	October 15	December 1
	January 15[1]	March 1
	May 15[2, 3]	July 1

Type of Application	Application Deadlines	Notification Dates
Training and Research Competitive	October 2	November 6
	February 5[1]	March 25

[1] Students graduating in Fall 2023 are not eligible to apply during this cycle and any cycles thereafter.
[2] Students graduating in Spring 2024 are not eligible to apply during this cycle and any cycles thereafter.
[3] Students graduating in Summer 2024 are not eligible to apply during this cycle.

How to Prepare Before Application Submission

1. **Submit PDS Report(s) for All Previously Approved PDS Applications**
   See the What To Do After Application Submission section for details.
   - o (**For PDS applications approved in AY22-23 or earlier**): Ensure that you have submitted completed PDS Report(s) for all previously approved applications. Your current application will be disapproved if your previous application(s) are missing PDS Reports. This includes previously approved funding you no longer wish to use. It is the student's responsibility to make sure all previously approved PDS applications have the PDS Reports completed. The PDS Report form is available on the PDS webpage.

   - o (**For PDS applications approved in AY23-24**): Use the online system to submit the PDS Report with your program administrator. You do NOT need to download any forms from the PDS webpage; everything will be submitted through the online portal.

2. **Download the Correct Advisor Signature Form**
   Starting AY23-24, there are only TWO types of signature forms, one for PDS Conference applications and one for PDS Research or Training applications (this applies for non-competitive and competitive applications; they will all use the same form).
   Visit: https://www.gs.emory.edu/professional-development/pds/apply.html (under the sidebar PDS Forms). **Do not** use older versions that you may have found online or on your computers from past academic years. Prepare your PDS application by obtaining the following documents, depending on the type of application:

Conference:
- A completed and signed **PDS Conference Participation – Advisor Signature Form (2023-24)**
- A PDF cover page or email from the conference organizer that must include the following information: (1) conference title; (2) conference dates; and (3) conference location. DO NOT upload the entire booklet.
- Documentation for each expense in $USD (consult the PDS Expense and Budget Guidelines section for details).

Research or Training (non-competitive or competitive):
- A completed and signed **PDS Research or Training – Advisor Signature Form (2023-24)**
- Documentation for each expense in $USD (consult the PDS Expense and Budget Guidelines section for details)
- [Competitive applications]: Current CV

Please note: A partially completed application form cannot be saved. Be sure you have all the items you need to complete the application.

What To Do After Application Submission

After the student has submitted their application, they should receive an email confirmation that they have submitted the PDS application. This email will include, among other details, the following information:

- Deadline of the current cycle
- Notification date of the current cycle
- Application type
- PDS application fund request amount

On the notification date listed, the student and the program administrator responsible for processing PDS funds should receive an email regarding the final approval or disapproval of the application.

If the student receives the approval email notification*, the student may pursue one of two options to complete their approved PDS application for the current cycle:

Option #1: Student accepts the approved funding:

1. Contact your graduate program administrator or designated staff person responsible for processing PDS funds in your PhD program, and request that your approved PDS funds be disbursed to you. They will provide any specific instructions to process the PDS funds and may provide you with a general timeline on when you may expect to receive the funds.
2. Use the funds according to the original budget and attend/complete the conference, training, or research activity.
3. Download the latest version of the PDS Report (for applications approved AY22-23 only; no form necessary for applications approved in AY23-24).
4. Complete the PDS Report to close out your application.**
5. Confirm that your program admin has updated your application record with the PDS Report.

Option #2: Student declines the approved funding:

It's possible that the student's plans have changed and so they longer wish to utilize the funds they have been approved for. To maintain an accurate record of all approved applications, please proceed as follows:

1. Download the PDS Report and indicate on the PDS Report form that you are declining the approved funds.
2. Complete the PDS Report to decline the funds and close out your application.**
3. Confirm that your program admin has updated your application record with the PDS Report.

*If the student was disapproved, they should read the comments section within the notification that will indicate the reason for disapproval. The student should consult the FAQ section of this Handbook to see if they are eligible to resubmit for the next PDS cycle.

**The approved applicant may have received funds that they need to return (whether in part or in entirety). In such cases, please visit the FAQ section, under the specific question about returning unused PDS funds.

HOW TO SUBMIT THE PDS REPORT

Please see the screenshots and information below on how to correctly submit the PDS Report after your conference, training, or research has concluded or after you have decided to decline the funding.

Because we are migrating to a new system, students may need to submit PDS Reports differently, based on when their application was originally approved (see below).

For PDS applications approved in <u>AY22-23 or earlier</u>, the student must download the PDS Report file available on the PDS website. They appear as follows (one for conference, other for training/research):

Download and complete one of the forms above and email the PDS Report to your graduate program administrator (PA) or staff person responsible for handling PDS Reports in your PhD program. Ensure that they have updated your previously approved application accordingly.

For PDS applications approved in <u>AY23-24</u>, the student can access the PDS Report function via the new online system for AY23-24. They do not need to download any forms from the PDS webpage. Ensure that your previously approved application through the new online system has been updated by submitting your report online. It will generate a link in the online system for the PA to complete a form online. They will no longer need any attachments to be emailed to them.

Please note: Students with outstanding PDS Reports may not be eligible for future PDS funding until all Reports for previously approved funds have been completed by both the student and the graduate program administrator. Confirm with your program administrator responsible for processing PDS funds that your previously approved application has been completed with the final PDS Report.

PDS Expense and Budget Guidelines

This section explains what kinds of expenses may be eligible or ineligible for PDS support and what kinds of supporting documents should be uploaded in the online PDS application. This is not an exhaustive list but serves as general guidelines. LGS will ultimately determine eligibility for funding. If you are considering including an item in your budget which is not covered in the table below, please contact LGS.profdev@emory.edu. We will consider the issue and provide guidance. We strongly encourage all students to submit any relevant questions before applying. Resolving any questions may take some time, so please start preparing your application as early as possible before the deadlines.

PLEASE NOTE: Funding is not guaranteed. Do not incur any expenses in advance if you are unable to cover the full cost of the conference, training, or research activity in cases where you do not receive any PDS funding (or only receive partial funding).

Food Expenses
PDS will generally follow the University guidelines with respect to how much students may budget:
- For destinations within the lower 48 Continental United States: refer to the **General Services Administration** per diem rates https://www.gsa.gov/travel/plan-book/per-diem-rates. (For AK and HI, please use the link above to search Alaska/Hawaii first, then it will provide information on where to obtain per diem rates for those states).
- For foreign rates, the **U.S State Department** establishes per diem rates in USD: https://aoprals.state.gov/web920/per_diem.asp. Find the country and city to identify the M&IE Rate.
- M Total is the maximum allowed (do not include incidentals).

Other Information
- If you receive a Laney Graduate School stipend during the time you will engage in the training or research, then it is expected that the stipend be used towards daily living expenses, including lodging, whether you are staying in the Atlanta area or traveling to another location. Please refer to the FAQ under the specific question, [For training and research PDS applications]: What is the section "Amount of stipend applied" that is found in the application portal?.
- Please remember to provide justification for all projected costs—explain why the training or research requires the listed expenses. The justifications need not be lengthy, but they are required, and they should show evidence that the projected costs are based on real needs with reasonable costs.
- Airfare funded by PDS should always be purchased through Emory Travel: https://finance.emory.edu/home/travel/index.html
- While we highly recommend students wait until approval before purchasing flights, we acknowledge that in some circumstances, it may be in the best interests of the student to purchase flights in advance. Airfare must be purchased through Emory Travel CTM or Maupin/Sequel if requesting PDS funds for flights.
- Therefore, pre-purchased flights through Emory Travel may be submitted and remain eligible for PDS funding, *with the implicit acknowledgment from the applicant that they have not yet been approved for any PDS funding*.

Expenses without any supporting documentation may be removed from consideration for PDS funding.
- All expenses should have clear supporting documentation or table summary attached to show the expenses.
- All expenses must be converted to USD on the PDFs uploaded (insert a small table or a second page that shows the conversion rate to USD).
   - Foreign expenses that do not show clear conversion rates in the table may be removed from consideration for PDS funding.
- If there are several fee schedules for any costs listed on your PDF file, please circle/box the exact cost that is relevant for your application within the PDF.

Item	Eligible	Supporting Documents to Submit When Applying	Not Eligible
Conference Participation Support			
Travel	▪ The cost of travelling from Atlanta to the location of the conference, by plane (coach fare), train or bus. Other departure locations will be considered with justification. ▪ Mileage costs for driving to a conference that is not in Atlanta, at the current university rate (See Emory Travel).	▪ Print-out or screenshot(s) of relevant reservation or other price quotes for flights. ▪ A Google or other map that indicates the distance to be driven For mileage costs, provide a table of total miles driven, with the current IRS rate calculated (2023 = $0.655/mile).	▪ Pre purchased gas with car rental. If seeking mileage costs, gas costs may not be included. ▪ Travel for conference in the metro-Atlanta area ▪ Any extra days (beyond 1 day) before or after the conference dates. See the FAQ for some flexibility on this point.
Lodging	▪ Hotel costs, AirBnB, or other lodging costs.	▪ Print-out of hotel reservation or other relevant price quotes. ▪ PDS Lodging Worksheet must be included for any lodging expenses. Applications that are missing the Lodging Worksheet may have the lodging expense removed from consideration for PDS funding.	▪ Non-budget hotel/lodging. E.g., students should not request PDS funding for a premium suite in a luxury hotel. ▪ Any extra days (beyond 1 day) before or after the conference dates. ▪ Lodging for conferences in the Atlanta area.
Registration Fees	▪ The fee for registering as a participant or attendee in a conference.	▪ Conference announcement with registration cost.	▪ Membership fee in the conference organization.
Other Expenses	▪ This money is intended to support the cost of meals, local transportation (bus, subway, airport shuttle), and other incidentals (tips, service charges, etc.). ▪ Rental cars (economy) If submitting any expenses in this category, the student must submit at least a table or estimate of these expenses. A request for Other Expenses with	▪ Estimates of specific daily expenses, using screenshots from Uber, other transportation websites, and/or per diem budget at reasonable rate. ▪ Receipts may need to be submitted to the student's own PhD program administrators after student's return	▪ Any extra days (beyond 1 day) before or after the dates of the conference. ▪ Poster printing ▪ Abstract fees

Item	Eligible	Supporting Documents to Submit When Applying	Not Eligible
	no documentation or clear explanation may be removed for consideration for PDS funding.	from their conference. Consult with your own program regarding their policy around receipts. We recommend students keep an accurate record of all receipts. They do not need to be submitted to receive the PDS funds, but it is best practice to maintain receipts for your PDS-funded activities.	

Training and Research Support

Item	Eligible	Supporting Documents to Submit When Applying	Not Eligible
Travel	▪ The cost of travelling from Atlanta to the location of the training or research, by plane (coach fare), train or bus. ▪ Mileage costs for driving to a training or research location that is not in Atlanta, at the current university rate.	▪ Print-out or screenshot(s) of relevant reservation or other price quotes for flights. ▪ A Google or other map that indicates the distance to be driven For mileage costs, provide a table of total miles driven, with the current IRS rate calculated (2023 = $0.655/mile).	▪ The cost of travelling within the Atlanta area. ▪ Pre purchased gas with car rental. If seeking mileage costs, gas costs may not be included. ▪ Any extra days (beyond 1 day) before or after the training or research dates. See the FAQ for some flexibility on this point. ▪ Job interviews.
Tuition and Other Fees	▪ Tuition or registration fees for courses, workshops or other training occasions. ▪ Fees for the use of research facilities such as laboratories, archives, etc. ▪ Fees charged by tutors or other instructors.	▪ Tuition and fee schedules. ▪ If a course offers scholarships to some students and you are eligible, please submit some evidence that you have applied for external funding (a copy of an application cover sheet, e.g.).	▪ Books or other materials needed for courses, workshops, or other training occasions. ▪ Taxes associated with international treaties. ▪ Trainings that are unrelated to student's progress to degree. ▪ Training that are connected to an academic conference ▪ Workshops/trainings that are basically conferences and presentations of works-in-progress

Item	Eligible	Supporting Documents to Submit When Applying	Not Eligible
			▪ Internet costs or cell phone roaming costs **For applications involving language training**: PDS will not fund language training under the PDS "Research" category. The student must apply under the "Training" category.
Research Equipment	▪ In general, PDS funds will not support the purchase of equipment. ▪ Specialized items (particularly those that are consumed by the research such as reagents or forms) required for research and not generally useful outside the research activity may be eligible. ▪ If funds for such items are approved, they will be the property of Emory Graduate School and should be returned at the end of the research.	▪ Documentation of the features and price of the item. ▪ Justification for why this item is necessary for the research. ▪ If the research is conducted at Emory, the applicant must provide evidence that the item is not available at Emory or is not available to the student.	▪ Items that need to be used in the research, but which are also generally useful outside the research activity. ▪ Examples include laptop or other portable computers, tablets, cameras, software, common lab equipment, etc. ▪ Office supplies (pens, notebooks, etc.). ▪ Internet costs or cell phone roaming costs
Other Research Costs	▪ Transcription ▪ Participant incentives ▪ Duplication of forms ▪ Reproduction of archive materials, up to $200 ▪ Cloud computing	▪ Documentation of the transcription rate. Transcription rates between $1.00 - $1.25/audio minute are typically approved under PDS. Students are required to complete 25% - 50% of their own transcriptions. ▪ Documentation showing that incentives are at a customary level. ▪ Documentation of duplication costs.	▪ Duplication of research articles or other background materials ▪ PDS will not fund open-access expenses or other expenses related to publications. ▪ Teacher training ▪ Workshops/trainings that are basically conferences and presentations of works-in-progress ▪ Paying for (research) assistants

Item	Eligible	Supporting Documents to Submit When Applying	Not Eligible
Lodging	▪ If you receive a Graduate School stipend during the time for which you seek PDS funding, it should be used to cover lodging expenses. ▪ If a course, workshop, laboratory etc. offers housing at a special rate (in dormitories or other places), you are expected to use that housing. ▪ If possible, we expect you to share a room. ▪ For short-term stays, hotel costs at budget hotels. ▪ For longer term stays, reasonable rental costs for student rooms or similar accommodations.	▪ Cost schedules from the location of training or research. ▪ Hotel cost schedules, including some comparisons of suitable options.	▪ Housing in the Atlanta area or in your primary residence. ▪ Non-budget/regular hotel rooms (e.g., a high-cost suite would not be eligible for PDS funding). ▪ Costs of an apartment here in Atlanta that you choose to retain while you are away conducting research or engaging in training.
Daily Expenses	▪ If you receive a Graduate School stipend during the time for which you seek PDS funding, it should be used to cover living expenses at the rate of $25/night. ▪ Outside the U.S., an estimated amount for daily expenses using information about local food and incidentals costs.	▪ For stays outside the U.S., locate information that helps you develop a reasonable and realistic estimate for the location in question, and provide that estimate and an explanation of how you arrived at it. If submitting any expenses in this category, the student must submit at least a table or estimate of these expenses. A request for Daily Expenses with no documentation or explanation may be removed for consideration for PDS funding.	▪ Living/lodging costs in the Atlanta area. ▪ Living/lodging costs for long-term stays based on restaurant costs. ▪ Cell phone costs (for roaming)
Local Transportation	▪ In general, the daily expenses allocation is expected to cover local	▪ If local transportation requires special arrangements, explain and document why those	▪ Local transportation in the Atlanta area. ▪ When mass transit is available, the

Item	Eligible	Supporting Documents to Submit When Applying	Not Eligible
	transportation (bus, subway, etc.). ▪ If local transportation requires other means – purchasing a bicycle, traveling by taxi, renting a car, or other arrangements – then these are eligible expenses. ▪ Travel in the extended area of the training or research location – train travel and similar things.	arrangements are necessary. Plausible justifications include personal safety. ▪ If you need to travel in the extended area of the training or research, explain why such travel is necessary. ▪ Locate information that helps you develop a reasonable estimate for the location in question and provide that estimate and an explanation.	presumption is that it will be used, and other arrangements need to be justified. ▪ Local transportation unrelated to the research or training (e.g., tourism or visiting).

PDS Application: Conference

Conference participation support is subject to both annual and lifetime eligibilities. Students are advised to keep the lifetime eligibility and program prioritization model in mind when making decisions about applying for conference funding. There is no competitive conference funding. All applications for conference support will be reviewed by the Laney Graduate School to ensure that the student is eligible and that the budget is within guidelines.

A. Eligibility Requirements

- The applicant must be enrolled in an eligible Emory doctoral program at the time of the activity.
- The applicant must be in good standing at the time of the application, in the LGS as well as in their programs.
- The applicant may not have more than one incomplete at the time of application.
- The applicant must have submitted PDS Reports for all previous activities funded by PDS. This includes submitting a PDS Report to decline funding for previously approved applications. The exception to this policy is if the activity (conference, training, or research) has not yet been completed and the student may wait until the activity has concluded to submit the PDS Report and can still submit a new application.
- The applicant must meet any program requirements, when applicable.

B. Support

Any type of conference participation is eligible for funding, including presentation of papers or posters, commenting, panel discussions, and simply attending. The student's advisor should help determine whether a conference has scholarly merit, and whether the student's participation in this conference is appropriate. Support is limited to travel to the conference site, conference registration, lodging costs, and other relevant expenses. More information is available on the PDS Expense and Budget Guidelines section of this Handbook. Virtual conferences are also eligible for funding. **Please note**: Poster printing costs, abstract fees, and excursions are not eligible for PDS conference funding.

C. Review

For AY23-24, there are <u>four</u> PDS Conference cycles. Students will receive an approval or disapproval notice by the notification date listed for a given PDS cycle.

D. How much conference funding am I eligible for?

For conferences the applicant has a lifetime eligibility of *up to* $2,500. Once the student has exhausted the lifetime eligibility for conference funding, PDS will not fund any future conference activity.

- For AY23-24: There are no candidacy limits for PDS conference applications.

E. What does each conference application require?

1. Signed and completed PDS Conference Participation – Advisor Signature Form (do <u>not</u> use a previous year's version but download the current version from the PDS webpage).
2. Documentation of the conference, regardless of whether you are presenting at the conference or not. **Do not submit the whole conference program,** but a one-page PDF from the conference organizer that <u>must</u> include (1) the conference title, (2) dates, (3) location, and (4) if applicable, your involvement in it.
3. Documentation for all budget items, which in most cases, is printed from the web. This includes documentation for any line item you fill out on the application, i.e., mileage for driving, plane fare, conference fees (excluding membership dues), lodging costs, or other expenses. For more information, please see the PDS Expense and Budget Guidelines or FAQ sections of this Handbook for how to enter this information correctly.

       a. Failure to include documentation for any extra budget items will result in these expenses being removed from consideration for PDS funding. Convert all foreign costs to USD by inserting either a textbox or a table to display the conversion.

       b. If you upload a registration page with several fee schedules, **please highlight/box** the exact expense you are referring to.

4. Any other internal program requirements must be met. These are dependent on your program. Check with your PDS contact in your PhD program for any clarification.

F. How should I pre-plan for a conference application?

1. Ensure that you have submitted completed PDS Report(s) for all previously approved applications.
2. It is best practice to apply as soon as you know you will be attending the conference. Conference organizations plan for their conferences many years in advance, so you should have the information necessary to apply on time.
3. Do not incur any expenses in advance if you are unable to cover the full cost of the conference activity if you do not receive any PDS funding.

G. How do I submit an application?

Please visit the section in this Handbook, How to Submit a PDS Application (LaneyConnect).

H. What happens after I submit the application?

Please visit the section in this Handbook, What To Do After Application Submission.

PDS Application: Training

Funding for supplemental training is intended to support instruction that is essential for student's research progress towards their degree and is not available at Emory. This progress does not entail teacher training or other professionalization trainings. There is no limit on the number of times a student may receive PDS training funds, but the eligibility is dependent on the total amount of previously approved funds (both in the non-competitive and competitive categories). Once the student's cumulative approved PDS funds (i.e., prior training funds received plus the current request) for support exceed the non-competitive eligibility total of $2,500, the student must apply for competitive funding.

Competitive applications are judged by a multi-disciplinary faculty committee. Funding is based on the training's contribution toward the student's progress, the student's use of previous PDS funding, as well as efforts to find external support for the current proposal. The competitive process is highly competitive and only a select number of applications will be funded. Due to the total budget available, not all applications will be funded, and in some cases, students may receive partial funding for their application.

Successful competitive applications automatically subsume the remaining non-competitive lifetime eligibility for the student in the training category. All applications for training support will be reviewed by the Laney Graduate School to be sure that the student is eligible and that the budget is not excessive.

A. Eligibility Requirements

- The applicant must be enrolled in an eligible Emory doctoral program at the time of the activity.
- The applicant must be in good standing at the time of the application, in the LGS as well as in their programs.
- The applicant may not have more than one incomplete at the time of application.
- The applicant must have submitted PDS Reports for all previous activities funded by PDS. This includes submitting a PDS Report to decline funding for previously approved applications. The exception to this policy is if the activity (conference, training, or research) has not yet been completed and the student may wait until the activity has concluded to submit the PDS Report and can still submit a new application.
- The applicant must meet any program requirements, when applicable.
- [Competitive]: The applicant for competitive PDS funding must also upload copies of PDS Reports for all previously funded training and research activity in their application. These PDS Reports will be considered by the review committee.

B. Support

PLEASE NOTE: An event is not eligible for PDS training or research funding just because it is called a "workshop," "seminar," or other similar terminology: if the session is focused on a narrow subject-matter, if it involves presentations of work-in-progress, if it operates like any general academic or professional conference, or if there are attached workshops to a host conference, such events are **not** eligible for funding under the training or research category. The student may apply under the PDS conference category.

1. Specific forms of professional training not available at Emory. In general, an event is eligible for PDS training support when it
   a. involves acquiring a skill or method – examples include language proficiency (if the language course is not offered at Emory), statistical methods, laboratory techniques, interview procedures, etc.; and,
   b. is advertised as a training involving faculty, tuition, and/or a specific learning goal. (see above, presentations of works-in-progress by faculty are <u>not</u> eligible under this category).
2. Eligible expenses include tuition and transportation. Where the training takes place away from Emory and the student is not receiving stipend support, lodging expenses for the duration of the training may be eligible for PDS funding. If a student receives a graduate school stipend during the period of training, support for lodging must be pro-rated. More information is available in the PDS

Expense and Budget Guidelines and FAQ sections regarding the "Amount of stipend applied" field that is displayed in the online application.

3. Acquisition of language not taught at Emory, or language training in a depth or character not available at Emory, when such training is essential to the applicant's dissertation research is eligible. This includes both tutoring and formal classes.

4. Students are expected to make full use of resources available at Emory before submitting PDS applications. These resources include summer classes oriented towards reading comprehension as well as the Structured Independent Language Study (SILS) program available through the Emory College Language Center.

5. PDS funds do not typically support language classes needed to pass program language requirements. Classes for these purposes are routinely available at Emory, so please consult the available resources beforehand.

6. Students seeking advanced or accelerated experiences must demonstrate that they have taken full advantage of Emory resources. While accelerated learning is an acceptable justification for PDS support of language training, such programs do not replace Emory resources. For example, taking an accelerated French program during the summer does not supersede the available French classes at Emory in the fall and spring.

7. Support is available for training that is essential to a student's progress towards degree.

8. If you have doubts about a particular event, please send an email to LGS.profdev@emory.edu with specific information about the event along with any website links, if available.

C. Review

For AY23-24, there are <u>three</u> non-competitive Training/Research cycles and <u>two</u> competitive Training/Research cycles. Students will receive an approval or disapproval notice by the notification date listed for a given PDS cycle.

- Competitive review considers the amount of previous PDS research and training funding as well as the current progress of the student to PhD degree. The review committee expects that previous projects will put the student in a better position to complete the proposed project or training. In addition, the review committee expects the students to have made diligent and exhaustive efforts to find external funding sources. Only a select number of proposals are supported under the PDS competitive category.

- Successful proposals (these must address the prompts within the online Training/Research application form), both competitive and non-competitive, are clearly written for an interdisciplinary audience. Please explain the significance of your proposal without use of jargon or technicality. Make sure that your budget and project timeline are explicitly related; members of the committee should have no difficulty determining when different parts of the project will be carried out.

- Applications for funds intended to support significant components of dissertation research through this training, including preliminary research, are expected to document that the student has pursued, and is pursuing, external grant funding. This documentation will typically include cover letters or pages from grant applications that were awarded, denied, or are pending review. Favorable consideration will be given to student requests that demonstrate a persistent effort to identify and apply for external funding.

D. How much training funding am I eligible for?

For training the applicant has a lifetime eligibility of up to $2,500 (non-competitive), given certain conditions:

a. There is no academic year limit according to (non)-candidacy. Students are eligible to apply for any amount at any time during the PhD program.

b. Once a student has reached the non-competitive eligibility of $2,500, they must apply for competitive funding.

    c.   For certain amounts, the student must apply for competitive funding, even if part of the request may utilize non-competitive funding. For example: if a student is eligible for $1,000 in non-competitive funds and the application is for $2,000, they must still apply for competitive funding because the application exceeds the $2,500 non-competitive eligibility.

    d.   These non-competitive limits are set. There are no exceptions to these limits.

    e.   There is a $5,000 total eligibility for non-competitive and competitive training/research funds. Any amount beyond this, the student must apply for competitive funding (even if the student has not received $2,500 total of non-competitive training funds to-date; see the FAQ section for details).

E. What does each training application require?

1. A complete proposal submitted online regarding the training you intend to acquire. This includes a signed and completed PDS Research or Training – Advisor Signature Form (do <u>not</u> use a previous year's version but download the current version from the PDS webpage).

2. Documentation for all budget items, which in most cases, is printed from the web. This includes documentation for any line item you fill out on the application as it pertains to your training request. For more information, please see PDS Expense and Budget Guidelines section in this Handbook.

    a.   Failure to include documentation for any extra budget items will result in these expenses being removed from consideration for PDS funding. Convert all foreign costs to USD by inserting either a textbox or a table to display the conversion.

3. Any other internal program requirements must be met. These are dependent on your program. Please check with your PDS contact in your program for any clarification.

F. How should I pre-plan for a training application?

1. Ensure that you have submitted completed PDS Report(s) for all previously approved applications.

2. It is ideal to apply as early as possible. Applications that are incomplete, e.g., missing budget documentation or signatures will be denied. In such cases, if eligible, the student may correct any errors and submit again in the next cycle, following the normal PDS policy.

3. Do not incur any expenses in advance if you are unable to cover the full cost of the training activity if you do not receive any PDS funding.

G. How do I submit an application?

Please visit the section in this Handbook, How to Submit a PDS Application (LaneyConnect).

H. What happens after I submit the application?

Please visit the section in this Handbook, What To Do After Application Submission.

[**IMPORTANT: For competitive training or research applications**]:
Please upload the CV in the correct upload field. In the online application, you will be able to generate a link to your faculty member, who will need to fill out a brief form of support for your application (no letter of recommendation needed). This is due at the same time as your application for the given cycle. If an applicant fails to have their faculty support submitted by the deadline, their application may not be eligible for funding.

        Please note that there are two cycles for competitive applications, once in the fall semester, and once in the spring semester. If there are certain training or research activities that a student *anticipates* being accepted for after a given competitive cycle, we recommend they submit a preliminary application for the eligible cycle with as much information included as possible/available to them at the time of application. There will not be any review of new applications after the deadline has passed (e.g., if a student was accepted into a summer training activity in April, they should have applied with available details by the February competitive cycle).

PDS Application: Research

Research is an integral and necessary part of doctoral education. For example, students must travel to archives or research sites, they must administer surveys, or they must provide payment incentives for research participants. There is no limit on the number of times a student may receive PDS research funds, but the eligibility is dependent on the total amount of previously approved funds (both in the non-competitive and competitive categories). Once the student's cumulative approved PDS funds (i.e., prior training funds received plus the current request) for support exceed the non-competitive eligibility total of $2,500, the student must apply for competitive funding.

Competitive applications are judged by a multi-disciplinary faculty committee. Funding is based on the training's contribution toward the student's progress, the student's use of previous PDS funding, as well as efforts to find external support for the current proposal. The competitive process is highly competitive and only a select number of applications will be funded. Due to the total budget available, not all applications will be funded, and in some cases, students may receive partial funding for their application.

Successful competitive applications automatically subsume the remaining non-competitive lifetime eligibility in the research category. All applications for research support will be reviewed by the Laney Graduate School to be sure that the student is eligible and that the budget is not excessive.

A. Eligibility Requirements

- The applicant must be enrolled in an eligible Emory doctoral program at the time of the activity.
- The applicant must be in good standing at the time of the application, in the LGS as well as in their programs.
- The applicant may not have more than one incomplete at the time of application.
- The applicant must have submitted PDS Reports for all previous activities funded by PDS. This includes submitting a PDS Report to decline funding for previously approved applications. The exception to this policy is if the activity (conference, training, or research) has not yet been completed and the student may wait until the activity has concluded to submit the PDS Report and can still submit a new application.
- The applicant must meet any program requirements, when applicable.
- [Competitive]: The applicant for competitive PDS funding must also upload copies of PDS Reports for all previously funded training and research activity in their application. These PDS Reports will be considered by the review committee.

B. Support

PLEASE NOTE: An event is not eligible for PDS training or research funding just because it is called a "workshop," "seminar," or other similar terminology: if the session is focused on a narrow subject-matter, if it involves presentations of work-in-progress, if it operates like any general academic conference, or if there are attached workshops to a host conference, such events are **not** eligible for funding under the training or research category. The student may apply under the PDS conference category.

1. Funds are intended to support travel and other direct expenses associated with accessing, acquiring and/or collecting data and/or scholarly resources not available at Emory. Included are domestic or international fieldwork, interviews, surveys, site visits, and archival research, to name just a few examples.
2. Support may include reasonable living expenses for the duration of the research. Where the research takes place away from Emory and the student is not receiving stipend support, lodging expenses for the duration of the training may be eligible for PDS funding. If a student receives a graduate school stipend during the period of research activity, support for lodging must be pro-rated. More information is available in the PDS Expense and Budget Guidelines and FAQ sections regarding the "Amount of stipend applied" that is displayed in the online application.

3. Students are expected to make full use of resources available at Emory before submitting PDS applications.
4. Support is available for research activity that is essential to a student's progress towards degree. **PLEASE NOTE**: Paying for a (research) assistant is not eligible for PDS funding.
5. If you have doubts about a particular event, please send an email to LGS.profdev@emory.edu with specific information about the event along with any website links, if available.

C. Review

For AY23-24, there are <u>three</u> non-competitive Training/Research cycles and <u>two</u> competitive Training/Research cycles. Students will receive an approval or disapproval notice by the notification date listed for a given PDS cycle.

- Competitive review considers the amount of previous PDS research and training funding as well as the current progress of the student to PhD degree. The review committee expects that previous projects will put the student in a better position to complete the proposed project or training. In addition, the review committee expects the students to have made diligent and exhaustive efforts to find external funding sources. Only a select number of proposals are supported under the PDS competitive category.
- Successful proposals (these must address the prompts within the online Training/Research application form), both competitive and non-competitive, are clearly written for an interdisciplinary audience. Please explain the significance of your proposal without use of jargon or technicality. Make sure that your budget and project timeline are explicitly related; members of the committee should have no difficulty determining when different parts of the project will be carried out.
- Applications for funds intended to support significant components of dissertation research through this training, including preliminary research, are expected to document that the student has pursued, and is pursuing, external grant funding. This documentation will typically include cover letters or pages from grant applications that were awarded, denied, or are pending review. Favorable consideration will be given to student requests that demonstrate a persistent effort to identify and apply for external funding.

D. How much research funding am I eligible for?

For research the applicant has a lifetime eligibility of up to $2,500 (non-competitive), given certain conditions:

a. There is no academic year limit according to (non)-candidacy. Students are eligible to apply for any amount at any time during the PhD program.
b. Once a student has reached the non-competitive eligibility of $2,500, they must apply for competitive funding.
c. For certain amounts, the student must apply for competitive funding, even if part of the request may utilize non-competitive funding. For example: if a student is eligible for $1,000 in non-competitive funds and the application is for $2,000, they must still apply for competitive funding because the application exceeds the $2,500 non-competitive eligibility.
a. These non-competitive limits are set. There are no exceptions to these limits.
b. There is a $5,000 total eligibility for non-competitive and competitive training/research funds. Any amount beyond this, the student must apply for competitive funding (even if the student has not received $2,500 total of non-competitive training funds to-date; see the FAQ section for details).

E. What does each research application require?

1. A complete proposal regarding the research you intend to pursue. This includes a signed and completed PDS Research or Training – Advisor Signature Form (do <u>not</u> use a previous year's version, but download the current version from the PDS webpage).

2. Documentation for all budget items, which in most cases, is printed from the web. This includes documentation for any line item you fill out on the application as it pertains to your training request. For more information, please see PDS Expense and Budget Guidelines section in this Handbook.
   a. Failure to include documentation for any extra budget items will result in these expenses being removed from consideration for PDS funding. Convert all foreign costs to USD by inserting either a textbox or a table to display the conversion.
3. Any other internal program requirements must be met. These are dependent on your program. Please check with your PDS contact in your program for any clarification.

F. How should I pre-plan for a research application?
1. Ensure that you have submitted completed PDS Report(s) for all previously approved applications.
2. It is ideal to apply as early as possible. Applications that are incomplete, e.g., missing budget documentation or signatures will be denied. In such cases, if eligible, the student may correct any errors and submit again in the next cycle, following the normal PDS policy.
3. Do not incur any expenses in advance if you are unable to cover the full cost of the research activity if you do not receive any PDS funding.

G. How do I submit an application?
Please visit the section in this Handbook, How to Submit a PDS Application (LaneyConnect).

H. What happens after I submit the application?
Please visit the section in this Handbook, What To Do After Application Submission.

[**IMPORTANT: For competitive training or research applications**]:
Please upload the CV in the correct upload field. In the online application, you will be able to generate a link to your faculty member, who will need to fill out a brief form of support for your application (no letter of recommendation needed). This is due at the same time as your application for the given cycle. If an applicant fails to have their faculty support submitted by the deadline, their application may not be eligible for funding.

Please note that there are two cycles for competitive applications, once in the fall semester, and once in the spring semester. If there are certain training or research activities that a student *anticipates* being accepted for after a given competitive cycle, we recommend they submit a preliminary application for the eligible cycle with as much information included as possible/available to them at the time of application. There will not be any review of new applications after the deadline has passed (e.g., if a student was accepted into a summer training activity in April, they should have applied with available details by the February competitive cycle).

How to Submit a PDS Application (LaneyConnect)

The new application portal is available through LaneyConnect (link available on the PDS webpage). Please visit the PDS tab within LaneyConnect. We may update this section with screenshots of the new application system sometime in September, but if there are any questions, please contact us at LGS.profdev@emory.edu.

Frequently Asked Questions (FAQ)

Q: How do I apply for PDS funds?
1. More information on how to access the application on the Laney Connect Hub will be available on September 1, 2023. **PLEASE NOTE**: Students with outstanding PDS Reports may be ineligible for PDS funding until PDS Reports for previously approved funds have been submitted. If you submitted PDS Report(s) for previously approved applications, confirm with your PA that they did their part to make sure your past approved application(s) have been updated correctly.

Q: What things should I consider before I apply?
Do not incur any costs in advance if you are not prepared to cover the full cost of the conference, training, or research activity in cases you receive no funding or only partial funding.
1. You must be in good standing with the LGS.
2. Please follow the funding guidelines discussed in the Budget Guidelines section of this Handbook.
3. You must have the support of your advisor and follow any program policies that govern PDS applications in your program.
4. Please use the funds for the stated intent. Failure to do so requires repayment back to Emory University.
5. Note the PDS Calendar with the deadline and notification dates for each cycle.
6. For all applications, aim to include a single summary table that clearly shows your total budget and requested PDS amount.
7. Ensure that you have submitted completed PDS Report(s) for all previously approved applications.
PLEASE NOTE: Please apply as early as possible. When applying to any other funding programs, they will not contact you for missing information or allow you to submit corrections past the deadline. Follow the same practice with PDS applications.

Q: What other requirements do I need to meet as I am applying?
Like other funding applications, it is imperative you follow the specific requirements to ensure your applications are complete and thorough. This includes all supporting documentation, signatures, and a proposal written for an interdisciplinary audience (for competitive and non-competitive research and training applications). In addition, being thorough also includes pre-planning for all types of PDS funded activity: training, research, and conferences. Please note the following:

1. Include any signatures that are required for your PDS application. Lack of signatures will result in an automatic denial of the PDS application.
2. Consult with the funding guidelines for each PDS application type available in the Budget Guidelines section of the PDS Handbook.
3. Supply complete documentation for each cost. The committees and the Laney Graduate School base decisions only on what is presented. We receive many applications during each cycle and time does not allow for the reviewer to infer costs.
4. In addition to #3 above, complete documentation means a full spectrum of costs associated with your application. Please calculate all costs correctly; due to the number of applications, time does not allow for the reviewer to calculate the expenses for each application. For example, providing a nightly room rate is incomplete; please include the nightly room rate multiplied by the number of nights you are staying, including all taxes associated. All foreign currency should include information about conversion rate to USD.
5. Please make sure all PDF scans are clear and legible. An illegible scan may result in an application being denied.
6. The Laney Graduate School will not send reminders to students to supply different or new documents, or to obtain signatures after the application is submitted. If the application is incomplete, it will be denied. The student must wait until the next cycle if the activity remains eligible under the PDS policy.
7. Please adhere to your program's own guidelines, and if applicable, the program's own internal deadlines.
8. Documentation can take various forms. Please note in your application any pertinent information for each supporting documentation. Best practice may mean <u>not</u> including 20 pages of conference documentation. Instead,

provide a one-page PDF of the conference coversheet that indicates your participation (when relevant), name of the conference, the dates, and the location. Please upload all documents in PDF format. It also means that if there are several different types of expenses, you should include a summary table of all expenses so that your total budget is clear.

Q: What is the $2,500 lifetime eligibility?
A: All students are *eligible* to be approved up to $2,500 each in PDS conference, training, or research funds.
PLEASE NOTE: If you do not know your eligibility for PDS funds, please send an email request for your PDS application history (conference, training, and/or research) to LGS.profdev@emory.edu with: (1) your full name and (2) your Student/EMPL ID number. You will be provided a list of your approved funding to-date so that you can determine your lifetime eligibility for any given PDS category.
If you did not complete and submit PDS Reports for previously approved applications, the information you may receive from our office may be inaccurate. Please make sure to submit the PDS Reports within 30 days after completion of your conference, training, or research activity.

Q: Are there candidacy limits (for training, research or conference applications)?
For AY23-24 there are no candidacy limits. But students should consult the priority list before submitting their applications or incurring any expenses in advance (see the section, Preliminary Information).

Q: What is the $5,000 total eligibility for non-competitive and competitive research or training funds, the point at which students must always apply for competitive funding?
A: All students have a lifetime eligibility of $5,000 *total* of competitive and non-competitive training or research funds. All requests thereafter must be for competitive funding. See the examples below as reference:
Example #1: Student received $2,200 *non-competitive training* funds and $2,300 *competitive research* funds to-date (currently at $4,500 total combination of all forms of research and training funds).
> **Can this student apply for $1,000 non-competitive research funds?** (The student has
> not been approved for any non-competitive research funds to-date)
>> No. The approved competitive application automatically subsumes the remaining eligibility in non-competitive research funds.
> **Can this student apply for $500 non-competitive training funds?**
>> No. This exceeds the $2,500 lifetime eligibility for non-competitive training funds, so the student must apply for *competitive* funds. They may, however, apply for up to $300.
> **Can this student apply for $500 non-competitive research funds?**
>> No. The approved competitive application automatically subsumes the remaining eligibility in non-competitive research funds.
> **Can this student apply for competitive training or research funds?**
>> Yes. The student has been approved $4,500 to-date and is eligible to apply for up to $3,500 in competitive funding ($4,500 + $3,500 = $8,000 max). See the next question below for eligibility questions about the $8,000 lifetime eligibility.

Example #2: Student received $2,000 *non-competitive training* funds and $2,800 *competitive research* funds to-date (currently at $4,800 total combination of all forms of research and training funds).
> **Can this student apply for $500 non-competitive training funds?** (The student has been approved $2,000 in non-competitive training funds to-date)
>> No. $500 would exceed the $5,000 total ($4,800 previously + $500 = $5,300). The student may apply for $200 in non-competitive training funds.
> **Can this student apply for non-competitive research funds?** (The student has not been approved for any non-competitive research funds to-date)
>> Yes. The student is eligible to apply for up to $200 total in non-competitive research funds. This amount would result in the student having received $5,000 total in non-competitive and competitive training/research funding.

Q: What is the $8,000 lifetime eligibility for non-competitive <u>and</u> competitive training/research funds?
A: All students have a total lifetime eligibility of $8,000 of training and research funding in any combination of competitive or non-competitive funds. No exceptions will be made to this policy.

<u>Example</u>: Student received $2,400 *non-competitive training* funds and $3,800 *competitive research* funds to-date (currently at $6,200 total combination of all forms of research and training funds).

> **Can this student apply for $500 non-competitive <u>research</u> funds?** (The student has not been approved for any non-competitive research funds to-date)
>> No. The approved competitive application automatically subsumes the remaining eligibility in non-competitive research funds.
>
> **Can this student apply for $100 non-competitive <u>training</u> funds?** (The student has been approved $2,400 in non-competitive training funds to-date)
>> No. The student has already exceeded the $5,000 total of non-competitive and competitive funding. All applications thereafter must be for competitive funding.
>
> **Can this student apply and be approved for $2,500 competitive <u>training</u> funds?**
>> No. This exceeds the $8,000 lifetime eligibility. The student is eligible to apply up to $1,800 in competitive training funds.

Q: [For training and research PDS applications only]: What is the section "Amount of stipend applied" that is found in the application portal?
A: Two conditions must be met for the student to enter an amount in this section in the application portal (at $25/night for lodging expenses included): (1) the student is currently receiving a Laney Graduate School stipend <u>and</u> (2) the student is requesting PDS funding for lodging. Please place all total costs in the PDS application *then* subtract your stipend applied amount. If the application is for a plane ticket only, the stipend does not need to be applied. If the student is under PI grant funding, the stipend does not need to be applied and the applicant may skip this section in the application portal. If a student meets both conditions above, please see the following examples to help calculate this accurately:

<u>Example #1</u>: If the research or training requires lodging expenses for 10 nights in August which costs $1200 total, enter the following value in the line, "Amount of stipend applied":

> ($25/night) * 10 nights = $250 applied
> $1,200 - $250 = <u>$950</u> may be requested for PDS funding

<u>Example #2</u>: If the research or training requires lodging expenses for 25 nights from mid-May to June, which costs $2,300 total, enter the following value in the line, "Amount of stiped applied":

> ($25/night) * 25 nights = $625 applied
> $2,300 - $750 = <u>$1,675</u> may be requested for PDS funding

<u>Example #3</u>: The student is conducting research overseas and is requesting PDS research funding for $1800 roundtrip flight in August (15 days in between flights). Does the student have to apply their stipend to this PDS application? No. The student is only requesting flights (not lodging), so they are eligible to apply for full <u>$1,800</u> expense in their PDS application.

Q: I submitted everything correctly, but my application is missing a signature. Will anyone contact me so that I can submit a new/complete signature?
A: No, this means you did not submit everything correctly. Due to the number of applications received, time does not allow tracking down each applicant's signatures or incomplete documents. It is the student's responsibility to submit a complete application; please remember that this should be standard practice for applying to all funders. Other funding programs will not contact you for missing information or documentation. The student may apply again for the next cycle following the PDS policy.

Q: Can I apply for PDS Research or Training funding to attend a workshop?

A: An event is not eligible for PDS training or research funding just because it is called a "workshop" or a "seminar": if the session is focused on a narrow subject-matter, if it involves presentations of work-in-progress, if it operates like any general academic conference, or if there are other attached workshops to a host conference, these are not eligible for funding under the training or research category. For such events, students may apply under the PDS Conference category only.

Q: I applied but was disapproved for a missing signature and incomplete documentation. Can I submit for the next cycle?

A: Yes. Please note that if you are applying retroactively, the event must have taken place between 9/1/23 and 8/31/24.

Q: I applied but was disapproved for missing PDS Report(s) for past approved applications. Can I submit for the next cycle?

A: Yes. Please note that if you are applying retroactively, the event must have taken place between 9/1/23 and 8/31/24.

Q: I applied but was disapproved for missing PDS Report(s) for past approved applications. But I submitted the PDS Report(s) already.

A: If this is the case, please check with your program administrator and make sure they followed the instructions regarding the PDS Report to make sure your past application record(s) have been updated correctly. Once that has been completed/confirmed, please contact us at LGS.profdev@emory.edu and we may generate a new approval notification email (provided all other aspects of your PDS application are in good order). A new approval, however, is not guaranteed for each cycle. It is always the applicant's responsibility to make sure that their past applications have been updated correctly.

Q: I applied, but I realized I was missing some documentation, can I send an email with an updated application?

A: If the deadline did not pass for the current cycle, you may submit a new application with all the correct materials and that application will be reviewed under its own merit. If the deadline has passed, you may apply during the next cycle.

Q: I just found out I am attending a conference in August, and it is late June. Can I still apply? Is the PDS system closed in the summer?

A: See the PDS Calendar for cycles for PDS funding.

Q: I missed the deadline because of _____, could I still be considered for the current cycle?

A: No. You may apply during another PDS cycle (provided it remains in line with the PDS policy).

Q: Will I receive the PDS Conference funds before I complete my conference travel? What about PDS Training or Research funds?

A: Yes. Starting mid-Spring 2022, all PDS funds may be disbursed to the student after the application has been approved. The student does not need to wait until the activity (Conference, Training, or Research) has completed to request the funds disbursement. After you have received the approval email for PDS funding, contact your program administrator (PA) or staff person responsible for processing PDS funds in your PhD program on how to receive the funds for the approved conference, training, or research application.

We also recommend approved applicants consult the section, What To Do After Application Submission, in the PDS Handbook.

PLEASE NOTE: All funds are disbursed directly to the student. PDS will not pay labs, the student's PI, or any other advisor or staff member. If you have questions about the disbursement process/timeline, contact the designated staff person in your program (usually the PA). They may be able to email their LGS Finance contact person regarding the exact timeline.

Q: What if I did not use all the PDS funds that I received? How can I return the money?
A: For all applications (including approved PDS funds that the student wants to decline), the student must submit the PDS Report through the online system. Submitting these PDS Reports with correct information ensures that historical records of all applications are accurate, and in the case of funds that the student declines, that these approved funds do not count against the lifetime eligibility for future applications. If there is more than $50 remaining from PDS funds received, they must return the funds (if less than $50, it does not need to be returned and the student's application history should indicate the full amount received).

If you did not use all the funds, you will indicate on the PDS Report how much of the actual funds were received and used. You will submit this Report and your graduate program administrator (PA) will sign-off on your submission to complete the PDS Report process.

If you received PDS funds that need to be returned, please proceed by following the steps exactly as outlined below:

[We are currently working with the University Finance team to see whether there can be an electronic return system, but that is not yet available. We will update you if/when that process is made available. For now, please follow the process outlined below]:

1. **Write** a check made payable to "Emory University" with your EMPL ID number clearly written in the notes section of your check.
     - **PLEASE NOTE**: The check may be a personal check, money order, or cashier's check. There is currently no electronic or online method to return unused funds.
2. **Print** out the original PDS approval notification email.
3. **Complete** the PDS Funds Return Form with your program administrator (PA). Contact your PA, they will know how to obtain and complete this form with you.
     - **PLEASE NOTE**: The PDS Funds Return Form is owned by LGS Finance. If they need this file, please ask the PA to send an email to their LGS Finance contact for this form.
4. **Include** the following in one envelope: (a) your check; (b) PDS Funds Return Form; and (c) approval notification email.
5. **Submit or mail** this envelope to: LGS Finance, Administration Building Suite 209, 201 Dowman Drive, Atlanta GA 30322 (Google Map link here).
     - **PLEASE NOTE**: If you are dropping off the envelope in-person, please ensure that it is left with someone in LGS Finance (let them know this is for PDS funds return).
6. **(For applications from AY22-23) Submit** the PDS Report to your program admin or staff person responsible for processing PDS funds and confirm that it has been uploaded to the online application system to your original PDS application record and that they have followed the instructions at the bottom of the Report form. At the same time, confirm with them that they have completed their own part by following the steps outlined to them in the instructions provided by LGS Finance.
     a. **For applications from AY23-24**, you may submit the PDS Report through an online process. See the section, What To Do After Application Submission, in this Handbook.

Q: If I have funds left over from a PDS approved application, can I use it to fund something else I need to do for my project?
A: No. Approved PDS funds must adhere to the original budget and proposal, and they may not be used for other purposes. If you do need more funding, you may of course submit a new application for approval for the new budget and project in future PDS cycles, following the PDS policy.

If you have funds that need to be returned, please refer to the question above regarding returning unused funds.

Q: I received PDS funds in my bank account but did not spend the money. What must I do to ensure that these unused funds do not count against my lifetime eligibility?
A: Please see the question above regarding returning unused PDS funds.

Q: What if I did not receive the approved funds and I no longer need to use the approved PDS funds?
1. Complete the PDS Report online to decline the funds. Your graduate program administrator (PA) or designated staff person will sign-off on this Report to complete the PDS Report process (and since you did not receive the approved funds, it will not count against your lifetime eligibility).
2. It is the applicant's responsibility to ensure that their program staff person has correctly updated the applicant's application with the PDS Report being completed.

Q: Am I required to use Emory Travel for PDS-related trips?
A: Yes, if you will be using the approved PDS funds to purchase airfare. This is a University-wide policy, which PDS follows, for flight expenses. You may, at time of application, submit an *estimate* from any source (Google Flights, airline websites, etc.), but at the time of purchase, use Emory Travel (CTM or Maupin/Sequel). Car rentals or hotels do not need to be purchased through Emory Travel.

Q: Can I purchase the flight through Emory Travel before applying?
PLEASE NOTE: Do NOT purchase flights or incur other expenses in advance if you are not prepared to cover the entire cost should you not receive any PDS funding.
A: We *highly* recommend students wait until approval before incurring any expenses, including airfare. Depending on the application, the student may be denied approval. Conference organizers plan conferences many years in advance, and therefore the student should have plenty of time to collect the necessary documents to apply for PDS as early as possible. Students may always upload an estimate rather than the ticket for the PDS application.

We do acknowledge, however, that flight prices fluctuate, and so it may be in the best interests of the student to purchase flights in advance. Therefore, pre-purchased flights through Emory Travel may be eligible for PDS funding, with the implicit acknowledgment from the applicant that they have not yet been approved for any PDS funding. In such a case, please purchase the flight through Emory Travel.

Q: What if I found a substantially cheaper flight elsewhere?
A: Do not purchase the flight. Contact Emory Travel directly with a screenshot/information of what you have found with a comparison of the same itinerary with Emory Travel: travel@emory.edu. You should contact them with the exact itinerary from Emory Travel websites versus another webpage. It is not helpful for them for you to submit different flights or classes of travel that cost different amounts.

Q: What document(s) do I need if the flight is upcoming, and it has not yet been purchased?
A: Prepare a PDF of flight estimate by one of the following methods:
1. Use Emory Travel Portal, showing the approximate cost of travel
2. Use another comparable search engine (e.g., from airlines directly, Google Flights, Expedia, Orbitz, etc.), showing the approximate cost of travel.

Actual purchase of flights must be through Emory Travel. If a cheaper flight was found elsewhere, please contact Emory Travel with screenshots of what you have found. They may be able to meet the lower price. Failure to use Emory Travel may mean that the flight expense request could be denied (other parts of the application may still be eligible for PDS). This is a University-wide policy for flight expenses.

Q: What document(s) do I need if I have already purchased the flight?
A: As noted above we highly discourage this practice of purchasing a flight prior to approval. But if you have already purchased a flight, prepare a PDF of the flight cost through the Emory Travel portal, showing your purchase through their system. This is the only accepted form of documentation for purchased flights. If a student uploads documentation of flight purchased outside of Emory Travel, it may be ineligible for funding through PDS.
PLEASE NOTE: Do NOT purchase flights or other expenses in advance if you are not prepared to cover the entire cost should you not receive any PDS funding.

Q: What if I have to stay extra days past the event date?
A: In the estimates, please show that your new date of travel is approximately the same as if you had traveled as soon as the event ended. For example, if your conference ends on 12/10 but you are flying on 12/16, you must

submit documentation for (a) 12/10 and (b) 12/16 that show similar costs. If your later flight costs significantly more than the earlier flight, your request will only be funded up to the cheaper flight amount. If you fail to provide documentation for both days, your PDS request for flights may not be eligible for funding.

PLEASE NOTE: PDS will fund flights and/or lodging up to 1 day before the first or 1 day after the last day of the conference or research/training without extra documentation. For example, if a conference ended on 12/10 and the flight is on 12/11, the application does not need to include two flight estimates. If an application includes longer stays without extra documentation, only the periods outlined above (up to 1 day before the first day of the conference and up to 1 day after the last day of the conference) will be funded.

Q: What if I need to fly back to Atlanta from a different city?

A: In the flight estimates, please show that your new departure city cost is approximately the same as if you had traveled from the event. For example, if your conference is in New York, but you seek to be funded for a flight back from Boston (NYC-BOS will not be funded by PDS), you must submit documentation for (a) NYC-ATL and (b) BOS-ATL that show similar costs. If your new location costs significantly more than the return from the original city, you request will be funded only up to the amount from the event location. If you fail to provide documentation for both locations, your PDS request for flights will not be funded.

Q: What if I am attending different conferences and/or training/research activities in two cities consecutively?

A: You may submit two *separate* PDS applications (each with their respective forms included).

For example: If you have a conference in Los Angeles, *then* a conference in San Francisco, you will include the following flight documentation:

- PDS Application #1: Flights from ATL-LAX-SFO (please write a comment noting that the LAX-SFO flight is to the event found in Application #2)
- PDS Application #2: Flight from SFO-ATL

Each application will be considered on its own. Approval of one does not mean an automatic approval of one; and a denial of one does not mean an automatic denial of the other. Both applications should follow the PDS policy.

Q: What if I am splitting lodging with colleagues from Emory?

A: This is completely acceptable, and many students share costs for lodging with colleagues. You will indicate this information in the lodging section of the online application portal.

For your own records, at time of checkout, it may be beneficial for you to receive from the hotel (or AirBnB, etc.) a receipt that clearly shows your full name as an occupant.

Q: What if my expenses include costs in foreign currency?

A: If any included receipts show foreign currency, include an itemized list that converts all foreign currency expenses to USD (include the current exchange rate at the time of application submission). Any expenses with unconverted foreign currency will be removed from consideration for PDS funding.

Q: Can I get the LGS speedtype/smartkey to purchase my flight after approval?

A: No, we do not provide Speedtypes. LGS does not provide students with smartkey numbers. Please make sure to select your own personal payment method when purchasing flights through CTM or Maupin Travel. If you are unable to use CTM, you must purchase through Maupin/Sequel.

Q: Should I incur personal expenses first and then apply for PDS funds?

A: We highly discourage this practice. Just like any other funding program, an applicant should wait until the funds are approved before incurring any expenses. Students should wait until receiving the PDS application approval before spending the funds necessary to engage in the conference, training, or research activity. We do acknowledge, however, that for certain costs it may be in the best interests of the student to incur expenses in advance, and so such items remain eligible for PDS funding with the implicit acknowledgement from the applicant that they have not yet been approved for any PDS funding.

PLEASE NOTE: Do NOT incur any expenses in advance if you are not prepared to cover the entire cost should you not receive any PDS funding.

Q: Am I guaranteed PDS funds if I apply?

A: No. PDS funds are limited and applications that meet the eligibility criteria will be awarded based on the priority models submitted by each program. The funds are made possible through generation donations to LGS and while all PhD students are *eligible* to apply for the funds, they are not guaranteed the funds in all circumstances. Please note that no PDS funds belong to any individual's student's account or exist as a balance for any specific student. Each applicant is *eligible* to be approved *up to* the various lifetime limits for the PDS funding categories.

PLEASE NOTE: Do not incur any expenses in advance if you are unable to cover the full cost of the conference, training, or research activity in cases where you do not receive any PDS funding (or only receive partial funding).

Q: When will I receive a decision regarding the submitted PDS application?

A: Please refer to the PDS Calendar available in this Handbook (also displayed on the PDS website) for the notification dates of any given PDS cycle.

Q: I received an application disapproval because it stated that I have used all of my funds for the academic year and/or the lifetime eligibility. But I did not use all of the funds from previous applications that were approved and never submitted the PDS Reports. Can the application be reconsidered?

A: It is the student's responsibility to make sure that their application records are up to date by submitting the PDS Reports on time. Once the Report(s) have been submitted, your graduate program administrator should review your past application(s) to reflect the correct PDS funding amounts. Once that has been completed, you may contact our office at LGS.profdev@emory.edu for a second review of your current application. It is possible that your most recent application may receive an approval, but this is not guaranteed.

PLEASE NOTE: Students with outstanding PDS Reports may not be eligible for future PDS funding until all Reports for previously approved funds have been submitted. The PDS Reports are also due for previously approved applications that the student wishes to decline. The Reports have a field where the student will indicate that they have declined the funds.

Q: If I apply several cycles in advance for PDS funding but I will graduate before the conference, training, or research takes place, could I still be eligible for PDS funds?

A: No. If the student will graduate before the activity takes place, the student is not eligible to apply. PDS funds are reserved for graduate students, and if you will graduate during a specific term, any activity thereafter is no longer under the purview of the Laney Graduate School or the PDS program.

Q: If I am traveling internationally, where do I submit the International Travel Form?

A: There is a separate process (outside of the PDS application portal) that is accessible from the PDS homepage. Please ensure that your release form is submitted along with other required information and documentation through the International Travel Form process described on the PDS webpage. Once submitted, the process may take two weeks for final approval so please make sure to submit this separate Form as early as possible. Delays in your submission of the International Travel Form may result in delays in your current PDS application being reviewed. If the delay causes the timeline to pass the notification date of the current cycle, it does not mean that your PDS application was denied, only that there will be a delay until that International Travel Form has been given final approval (you will receive a separate email communication regarding this). Your approval of the International Travel Form is separate from the PDS approval process (approval of one does not mean the automatic approval of the other).

Q: What if I spent more money than what was originally approved for PDS funding? May I request additional funds?

A: Yes, if the deadline has not passed yet, they may submit another application in the current cycle or apply in the next cycle (note that additional funding is not guaranteed, similar to all applications).

Q: BME PhD Students Eligibility
A: Starting 2019-20, BME PhD students (**Emory Labs only**; if the student's lab is located at GaTech, they are not eligible) have the same funding eligibility as all other PhD programs. Those who have already received PDS funds prior to this year will have those funds counted against their lifetime eligibility.

Q: Who is the DGS (Director of Graduate Study)?
A: Please visit the following webpage for the list of directors of graduate study for all PhD programs: https://gs.emory.edu/about/directors-staff.

Q: Who is the graduate program administrator (PA)?
A: Please visit the following webpage for the list of graduate program administrators for all PhD programs: https://gs.emory.edu/about/directors-staff
Please note: Some PhD programs may have another staff member who is responsible for processing PDS funds and uploading PDS Reports. Contact your program administrator regarding this information.

Q: What if my faculty advisor is away or unavailable physically to sign the form?
A: In such cases, please obtain an email from them (with their name, email address, and date clearly displayed) indicating their support for your PDS Conference, Training, or Research activity. You may attach this behind your PDS Conference, Training, or Research signature form in lieu of the signatures on that first page. Electronic signatures are also accepted.

Q: If I have any questions about the PDS application process, should I email my DGS or the faculty advisor?
A: No. Unless it is about receiving their approval and signature(s) to travel to the specific conference or to engage in the specific training or research activity, we recommend you either contact your graduate program administrator (PA) or another staff member in your program familiar with the PDS application process. You may also contact us at LGS.profdev@emory.edu with questions regarding PDS.

Q: Is there anyone available to walk me through the application process, if needed?
A: Yes. We would be happy to schedule a meeting with you to discuss any questions you may have about the PDS program or the application process. Please contact us at any time at the email address listed below.

After reading this Handbook and the FAQ, if you have any further questions, please contact us at: LGS.profdev@emory.edu.