



# Travel Training

October 2015

# Stanford Travel Policy and Procedures

- Familiarize yourself:
  - Axxess training
    - Traveling for Stanford - FIN-0400-000001
      - Online training for travelers
  - Gateway to Financial Activities
    - [Fingate.stanford.edu](http://Fingate.stanford.edu)
    - University financial policies and procedures
  - Administrative Guide
    - [Adminguide.stanford.edu](http://Adminguide.stanford.edu)
    - Travel policy is in Guide Memo 36.7

# When to use a Stanford card

## **Travel Card** – use for air and hotel

- Everyone can use
- You don't lay out your own money
- Simpler for Admin staff to process
- BUT - *Business Purpose and detailed receipts are still required*

## **Purchasing Card (P-card)** – for conference registration

- Staff and faculty only



# Use Stanford's Travel Agencies

- Especially for overseas travel
- They ensure compliance with 'FlyAmerica Act'
- They can do the legwork to find a lodging
- Find them on Fingate:
  - [https://web.stanford.edu/group/fms/fingate/staff/travel/stanford\\_travel.html](https://web.stanford.edu/group/fms/fingate/staff/travel/stanford_travel.html)
- Orbitz is the preferred travel management service for Stanford travel

# FlyAmerica Act

[http://fingate.stanford.edu/staff/travel/policy\\_notes/fly\\_america\\_act.html](http://fingate.stanford.edu/staff/travel/policy_notes/fly_america_act.html)

**Be aware, be very aware!**

- If traveling overseas on a sponsored grant, you **MUST** use a U.S. flag carrier - not a code share e.g. your flight number must be United, not Lufthansa
- There are exceptions - enlist the help of admin staff *before* you buy your ticket

## Other exceptions

- ASK before you go

There are occasional exceptions to policy

- Combining business and personal travel

Include documentation for

- Cost of travel for the business trip only
- *and*
- Actual travel charge

# Actual expenses vs. per diem

- Actual expenses for reimbursement
  - Requires retaining receipts
  - [http://fingate.stanford.edu/docs/iOU\\_checklist.pdf](http://fingate.stanford.edu/docs/iOU_checklist.pdf)
- Request per diem for lodging and/or food and incidentals
  - Pro-rate on certain days
    - [http://fingate.stanford.edu/staff/reimburse/res\\_jobaid/per\\_diem\\_rates.html](http://fingate.stanford.edu/staff/reimburse/res_jobaid/per_diem_rates.html)

# Receipts

- Provide proof you took the trip – such as a detailed hotel bill or boarding passes.
- Provide copies of boarding passes when you check in online.
- Get itemized receipts – credit card statement or payment slip aren't enough:
  - Hotel
  - Meals (food, alcohol, tax and tip all itemized)
    - If more than \$75





## Don't eat twice

Do not request reimbursement for any meal that is not eligible to be reimbursed.

For example:

- A meal is included in the conference registration fee (even if you don't eat it)
- Your colleague pays for dinner for both of you
- You would reasonably eat at home on a travel day

# After you Return

- Submit your reimbursement request or documents to clear your advance, *promptly*.

Your reimbursement may be TAXABLE, If it is not submitted within 60 days of the initial expense.



# The 5 Ws

## General Guidelines

- The Business Purpose section of the reimbursement request provides the business justification for the expense.
- The Business Purpose should answer five basic questions:
  - Who (traveled)
  - What (did the traveler do on the trip)
  - When (inclusive dates of the business portion)
  - Where (location of conference/work)
  - Why (did the traveler go/how did the project benefit?)

# Who was involved in the activity?

Give the name(s) of the person(s) and their organization and/or department involved in the activity. For example, if reimbursement related to a business meal, the WHO component would be a list of the attendees and their affiliation to Stanford.

**Nigam Shah** held a dinner meeting at McDonald's, Palo Alto, CA with **Jyotishman Pathak of the Mayo Clinic** on Nov 4<sup>th</sup>, 2014 for a strategy discussion, concerning collaborative technical aspects of the Mayo subcontract from Stanford for the National Center for Biomedical Ontology (NCBO), in preparation for the November 5-6, 2014 meeting between Mayo Clinic and Stanford Biomedical Informatics Research staff.



# What activity was performed?

Explain the activity or circumstance that gave rise to the expenditure.

Nigam Shah **held a dinner meeting** at McDonald's, Palo Alto, CA, with Jyotishman Pathak of the Mayo Clinic on Nov 4<sup>th</sup>, 2014 for a strategy discussion, concerning collaborative technical aspects of the Mayo subcontract from Stanford for the National Center for Biomedical Ontology (NCBO), in preparation for the November 5-6, 2014 meeting between Mayo Clinic and Stanford Biomedical Informatics Research staff.

## When did the activity occur?

- Indicate the date or inclusive dates the activity took place. Specific dates are also part of the item descriptions, and dates included in the Business Purpose can be more general (the entire trip, for instance, instead of the date of each meal).

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## Where did the activity take place?

- Give the location of the activity: to/from destinations, restaurant name and city, or other appropriate information.

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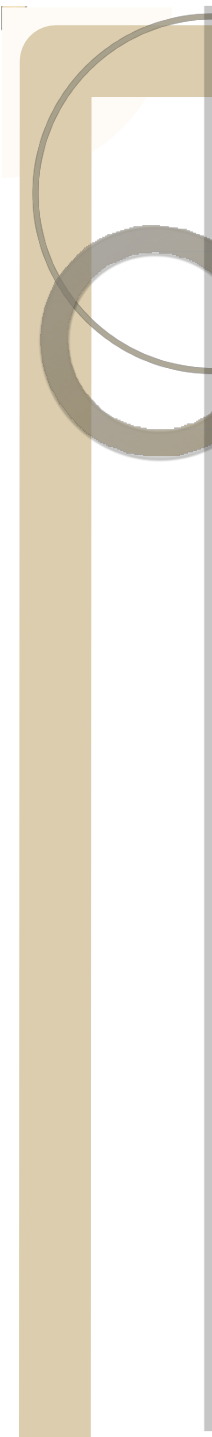

# Why was the activity done and how did it benefit Stanford?

For Sponsored Research grants, how did the activity benefit the grant?

Describe the benefit to Stanford. For example, does it further ongoing research or teaching efforts?

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- In general, a Business Purpose should be written so that someone reading it at some future time (e.g. 2-3 years later) would have no questions about the activity and why it was reimbursable.

## Local travel

- Meals and lodging for travel within 50 miles from point or origin will not be reimbursed
- Mileage can be reimbursed



**How is this for a business justification?**

**Reimbursement for meeting**

Registration for Mickey Mouse at the ABCD meeting in Japan on Nov 10-20, 2014. Attendance required by the NCBO award.


# What about this one?

***Tatonetti AMIA reg Mar 2010.*** Reimbursement of registration fee for Biomedical Informatics student Nicholas P. Tatonetti who is presenting his paper “A Novel Method for Scoring Candidate Genes in Association Studies: Application to Warfarin Response” at the American Medical Informatics Association Summit on Translational Bioinformatics in San Francisco, CA, on March 10-12, 2010.

# And this one?

## **Smith ISWC2009 Trip, 11/24-29/09:**

**WHO:** John Smith, Stanford Center for Biomedical Informatics Research (BMIR).  
**WHAT:** Attendance at the International Semantic Web Conference (ISWC) where Mr. Smith presented his paper with the title "Ontology-Driven Software: What We Learned from Using Ontologies as Infrastructure for Software" at the workshop on Semantic Web-Enabled Software Engineering (SWESE). **WHY:** ISWC is the major international forum where the latest research results and technical innovations on all aspects of the Semantic Web are presented. The research work that we are conducting at BMIR relies heavily on Semantic Web technologies and the BioPortal, which is developed within the NCBO project, is an essential resource for the entire Biomedical community. Publishing at an ISWC workshop about the novel architecture of the BioPortal that we designed and implemented at BMIR was very important for the NCBO project and had a great advertisement value. The participation at such a highly attended conference was also a great opportunity to meet and interact in person with: BioPortal users; fellow researchers working on similar problems; and people interested in funding the type of research that we do at BMIR. **WHEN:** November 24-29, 2009. **WHERE:** Westfields Conference Center, Chantilly, VA (near Washington D.C.)



Each and every financial transaction must contain a thorough, informative, yet succinct, business justification.

# Emergency

Everyone has access to emergency coverage while overseas.

- Faculty and Staff: see

[http://fingate.stanford.edu/docs/global\\_activity\\_ops\\_guide.pdf](http://fingate.stanford.edu/docs/global_activity_ops_guide.pdf)

- Students: through Cardinal Care

- Postdocs: through Anthem HMO or PPO plan. See <http://postdocs.stanford.edu/benefits/>

# Documentation

- Travelers are required to submit complete documentation
  - Travel form
  - All required receipts. Tape small receipts onto 8 ½ by 11 paper or scan and send electronically to your Student Services representative



# Receipts

## Staff and Faculty

No receipt required if < \$75 (except meals, if not using per diem)

## Students (including postdocs)

Receipts for everything, regardless of amount.

- Pre-approval form required
- Certificate of travel required
- No reimbursement for alcohol at all

# Students

Travel request form

<http://bmi.stanford.edu/biomedical-informatics-students/forms.html>

Travel process flowchart

[http://bmi.stanford.edu/biomedical-informatics-students/FilesCurrentStudents/Student\\_Handbook.pdf](http://bmi.stanford.edu/biomedical-informatics-students/FilesCurrentStudents/Student_Handbook.pdf)