Travel Training

October 2015
Stanford Travel Policy and Procedures

• Familiarize yourself:
  ◦ Axess training
    • Traveling for Stanford - FIN-0400-000001
      • Online training for travelers
  ◦ Gateway to Financial Activities
    • Fingate.stanford.edu
    • University financial policies and procedures
  ◦ Administrative Guide
    • 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

• Orbitz is the preferred travel management service for Stanford travel
FlyAmerica Act


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

- 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
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 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 4th, 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.

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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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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
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?

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.
Everyone has access to emergency coverage while overseas.

- Faculty and Staff: see 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/
• 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